

Imagine San Diego ▶▶

SAN DIEGO » AMAZON » HQ2

Life.
Changing.

S/D



Where California begins...again.

Table of Contents.

Introduction	01
Region & Economy Overview	02
Sites	03
Incentives	05
Talent	05
Compensation	06
Education: The Talent Pipeline	07
Transportation & Connectivity	09
Community & Quality of Life	11
Housing, Crime, Cost of Living Data	14
Appendix A: Letters of Support	
Appendix B: Incentives	
Appendix C: State Commitment	

**Work.
Live. Explore.**





Introduction

San Diego is where California began: The place where the idea and the promise of California came to life. Since then, it has remained a place for pioneers, innovators, risk takers, entrepreneurs and people who change the world.

San Diego is a reflection of *Amazon's Leadership Principles*. Our world-class UC San Diego computer science program, which graduates more women engineers than any other university in the U.S., shows our passion to *learn and be curious*. We are thought leaders and are *right a lot* in embedded devices, unmanned systems, life sciences and machine learning. We move quickly and *take bias for action* in our burgeoning downtown tech startup scene. And in this proposal, *we think big* about how housing HQ2 in San Diego would be a game changer for both our region and for Amazon itself.

San Diego County meets and exceeds all the requirements of the Amazon HQ2 RFP, and the region is able to accommodate the development of Amazon's HQ2 in the timeline specified. The information contained within this proposal, and the supporting letters (Appendix A) will provide Amazon with all of the necessary and relevant information to arrive at a decision regarding feasibility of HQ2 within the San Diego market.

Here, you'll find proposed sites including a blank canvas in one of California's fastest-growing and most diverse coastal cities, a downtown campus that weaves innovation through a vibrant urban core and a master-planned redevelopment of one of San Diego's most central and iconic locations. In all cases, you'll find that Amazon's HQ2 meshes seamlessly into our community and our culture.

Region & Economy

Overview

San Diego County is home to more than 3.3 million people spread across 18 cities. The region is consistently recognized as a top life sciences market with an established tech scene, supported by distinguished universities and unrivaled quality of life. San Diego is part of a larger binational region that encompasses San Diego County, Imperial County and Baja California, Mexico. With a combined population of more than 6.5 million people, a 27,000 square mile footprint, two international airports and the busiest land port of entry in the western hemisphere, our binational identity offers unique business and lifestyle opportunities.

In 2016, California surpassed France as the sixth largest economy on the planet. Helping drive this economic powerhouse, San Diego's gross domestic product is the fourth largest in California totaling \$215 billion.¹ If we were our own state, San Diego would rank as the 26th largest economy in the country. San Diego's economy – combined with the region's diverse communities, population and global connectivity – supports the attraction and retention of top talent and some of the world's most innovative companies. Global leaders from Illumina, Qualcomm, FICO, ViaSat, Intuit and Thermo Fisher to ServiceNow, General Atomics, GoPro, Northrop Grumman, NuVasive, Johnson & Johnson and Leidos are either headquartered here or have invested significantly in the region.

INNOVATION DRIVES SAN DIEGO | San Diego's economy is made up of three major pillars: innovation, driven by our region's educated, energetic and talented workforce; tourism, built upon our region's coastal geography and rich culture; and defense, including the largest concentration of military assets in the world. Talent is the heart of San Diego's economic engine – *we hire and develop the best*. Our broader innovation economy sits on a foundation of established industries, including life sciences, information and communication technologies and aerospace/defense.

Over the last decade, the intellectual capital generated across these pillars has accelerated growth in cybersecurity, software development, biotech and clean energy. More recently, this diverse set of core competencies has propelled growth in burgeoning industries that include unmanned systems, robotics, machine learning, 3D printing, genomics, precision medicine, IoT and more. Stimulating endless opportunities for converging research and technology across industries, San Diego's innovation economy plays a crucial role in the success of our ecosystem.

Key Clusters: San Diego's Innovation Economy

TECHNOLOGY | Quickly becoming a tech mecca, San Diego has built successful clusters in telecommunications, cybersecurity, health IT, bioinformatics, data analytics, gaming and software as a service. San Diego-based tech companies are supported by the seventh largest number of software proficient individuals in the U.S. working across nearly every facet of our innovation economy.² With an increasing global reach and a curious and inspired workforce, San Diego is the third most *inventive* in terms of patent generation compared to all other U.S. cities.³ In 2017, we were ranked the fourth best place in the U.S. for startups.⁴

LIFE SCIENCES | San Diego's life sciences cluster is a major driver of our innovation economy. The region is home to more than 1200 life sciences companies and more than 80 independent and university-affiliated research institutes⁵, including The Scripps Research Institute, the Salk Institute for Biological Studies and the J. Craig Venter Institute. At a time when personalized medicine is taking precedence, San Diego is a leader in genomics – home to Illumina, Thermo Fisher, Human Longevity Inc. and 115 other industry trailblazers. In 2016, nearly one quarter of all genomics VC dollars in the U.S. came to San Diego companies.⁶ A world-renowned research hub (Torrey Pines Mesa) and a driven community of biotech entrepreneurs combine to make San Diego the third strongest life sciences market in the country.⁷ And we know how to *deliver results*.

DEFENSE | San Diego's defense cluster continues to play a vital role in the region's innovation and military economies while supporting U.S. national security priorities. San Diego is home to the largest concentration of military assets in the world, including SPAWAR, the Navy's acquisition command and research lab for C4ISR, which employs more than 3,000 people.

The two most advanced UAV companies in the world, General Atomics and Northrop Grumman, maintain global headquarters and a research center of excellence in San Diego, respectively. We set the *highest standard* in unmanned systems, cybersecurity and aerospace. Local expertise provides companies with a strategic advantage in product development, job growth and the commercialization of defense technology. The quintessential example of this dates back to 1985 when seven veterans, funded by SPAWAR, outlined a plan that has evolved into one of the telecommunications industry's greatest startup success stories: Qualcomm Inc.



Proposed HQ2 Sites

The San Diego region presents a variety of options that meet the site criteria set forth in Amazon's RFP. Each of the sites have been vetted against the requirements (proximity, connectivity, timetable for buildout, available incentives) to achieve at least 8,000,000 square feet and each presents a unique opportunity for development. Site-specific plans, timelines and incentives are listed in the corresponding appendices.



City of San Diego

DOWNTOWN | San Diego's urban core presents numerous opportunities for development in accordance with Amazon's proposed timeline (See external information: City of San Diego, pages 13-21). The historic, revitalized Gaslamp District and surrounding downtown area allow for an urban campus similar to the South Lake Union area of Seattle. This area is walkable, densely populated (currently 35,000 downtown dwellers – growing to 65,000 by 2050) and immediately adjacent to UC San Diego's downtown campus (in development), San Diego Convention Center and numerous other amenities and planned housing developments. Downtown offers a vibrant quality of life that continues to attract millennials and young professionals to its bustling neighborhoods including East Village, Little Italy and Barrio Logan.

Downtown has been named a top location for startups in San Diego since 2014. In 2016, the area welcomed 28 new innovation startups, while downtown-based companies raised more than \$100 million in venture capital investment, primarily in software.

Downtown San Diego borders the historic Balboa Park, San Diego International Airport, the Port of San Diego and is well connected by public transportation. Individual parcels that are included in the downtown option are owned by a mix of private and public entities and have an array of possible incentives. Dependent on which sites Amazon would consider, the City of San Diego can provide a more specific estimate of incentive valuation.

CENTRAL | In the heart of the San Diego region, Mission Valley offers an opportunity to build out an entire campus on a single parcel (See external information: City of San Diego, page 22). Owned and operated by the City of San Diego, the 167-acre site offers a location that is proximate to large retail, housing (67,000 units) and numerous hotels with direct access to trolley lines. The site is connected to San Diego State University, downtown San Diego and UC San Diego (blue line in development) via trolley. As with city-owned parcels downtown, the City of San Diego is able to make concessions and incentives to accommodate Amazon's development needs. Site development, controlled by FS Investors, includes an MLS soccer stadium, 60 acres of parks along the San Diego River, pedestrian pathways to activate the entire development and flexible retail options.

This development is currently set as a ballot measure for a November 2018 vote. If passed, it would allow for development with over-the-counter permitting processes and would safeguard the site against conditional use permit approval from City Council. Should the site be a preferred option, specific development plans can be drafted ahead of the vote, ensuring an efficient building process that can break ground immediately following approval. The ballot measure received momentous support from the public and is expected to pass with a large majority. However, in the event that the measure fails, the city also has the option to approve development with a majority vote of the City Council.

BORDER ADJACENT | At the southernmost point in the San Diego region, the Otay Mesa area provides several greenfield development opportunities that are immediately adjacent to the growing tech talent pool in Tijuana (See external information: City of San Diego, page 23) and surrounding San Diego region. The site in Otay Mesa offers convenient access to the Tijuana International Airport through the first-of-its-kind Cross Border Terminal (CBX). These sites are also adjacent to a planned development of 4,000 new homes.

City of Chula Vista

URBAN | Chesnut Properties and the City of Chula Vista are offering to build a state-of-the-art Platinum LEED and WELLNESS-certified office development (See external information: City of Chula Vista and Millenia Site Plan). The site has the zoning and entitlements for the full build out of combined office space across two sites, with each site capable of delivering four million square feet of new office space. Building permits for the first 500,000 square feet are ready to be issued, ensuring delivery by 2019. The site is surrounded by housing at the lowest median household price available in the county, new K-12 schools, parks, fire stations and a proposed library, all within walking distance.

The Chula Vista site is located immediately adjacent to State Route 125 and is a 15-minute drive to downtown San Diego, a 20-minute drive to San Diego International Airport or a 40-minute bus ride on the Bus Rapid Transit line (opening in 2019). This site is also proximate to current and planned housing (additional 18,000 units planned in surrounding community), retail options and amenities and next to a planned university site. The City of Chula Vista is able to offer a substantial incentive package, estimated at more than \$400 million, for Amazon. In addition, Amazon would have the opportunity to guide the university selection process.

Incentives

Available incentives include a combination of programs provided at the state, county and city levels. San Diego utilities, service providers and organizations have also come together to offer additional incentives and concessions. Available and applicable incentive programs are listed in Appendix B, with further detail of state commitment in Appendix C.

Talent

San Diego's workforce is young, experienced, educated and diverse. When compared to peer metros, San Diego ranks second for growth rate of degree-holding millennials and concentration of workforce in science and engineering jobs (see table). The region continues to compete globally in attracting and retaining engineers, scientists and technology professionals. San Diego's quality of life, combined with opportunities in tech-based industries, means that the best and brightest choose to work and live here. Add to that a robust service sector with professionals in finance, marketing, sales, facilities management and other administrative positions, San Diego's talent continues to be our strongest asset.

Workers in Science & Engineering Occupations per Thousand Workers, 2014

Rank	Metro	Engineering	Science	Total
1	San Jose	57.2	11.4	68.6
2	San Diego	31.2	16.7	47.9
3	San Francisco	23.5	19.1	42.6
4	Boston	25.8	16.2	42.0
-	Peer Avg.	28.3	13.4	41.7
5	Seattle	30.5	10.8	41.3
6	Portland	30.2	9.3	39.5
7	Austin	30.2	9.1	39.3
8	Denver	25.4	10.9	36.3
9	Baltimore	20.6	11.9	32.5
10	Pittsburgh	19.8	9.6	29.4

Source: Bureau of Labor Statistics OES, 2014



In San Diego, 37.1 percent of the population holds a bachelor's degree or higher and 2.1 percent of the population has a doctoral degree – significantly higher than the U.S. average of 1.3 percent.⁸ San Diego is growing its degree-holding population at a faster rate than any other major metro area in the U.S., adding 72,000 degree holders to the region in 2014. Locally, San Diego graduates more than 15,000 STEM students every year at the college and university level through distinguished programs in biological sciences, computer science, mathematics, engineering, environmental science and many more. UC San Diego alone graduates more computer science majors annually than both UC Berkeley and Stanford.⁹

San Diego's knowledge-driven economy is fueled by top ranked universities (UC San Diego is ranked #15 top university in the world and #11 CSE program¹⁰), research institutions that conduct globally impactful research and an entrepreneurial spirit that permeates through the economy (477 new startups in 2016, half of which were software companies¹¹).

Attraction

Every metro region in the U.S. faces a STEM talent deficit that has spurred a nationwide battle for educated and experienced workers. To ensure that San Diego maintains its competitive edge, the region is focusing not only on retaining local talent, but growing its talent pool. The San Diego: Life. Changing. campaign was developed through a collaborative alliance of more than 90 local businesses. With tools and resources now available on SDlifechanging.org, the region's first work-live-play website, local companies now have the ability to tell an authentic story about how San Diego stands apart from other regions. As such, talent around the world is becoming apprised of the life-changing opportunities available in our region.

Compensation

Below are median salaries¹² for the positions described within the Amazon RFP. San Diego boasts a high concentration of engineering talent, demonstrating that in technical fields, San Diego is able to attract and retain engineers in key development disciplines. According to Amazon's current San Diego development office, this has resulted in the company's ability to recruit talent with a very low attrition rate.

CHIEF EXECUTIVES | \$211,251

MANAGEMENT OCCUPATIONS | \$107,027

SYSTEMS SOFTWARE DEVELOPERS | \$115,731

APPLICATIONS SOFTWARE DEVELOPERS | \$106,558

SOFTWARE DESIGN ENGINEERS | \$110,362

ENGINEERS (GENERAL) | \$102,172

LEGAL OCCUPATIONS | \$87,725

ACCOUNTANTS AND AUDITORS | \$73,590

SECRETARIES AND ADMIN ASSISTANTS | \$38,605

ADMINISTRATIVE SERVICE MANAGERS | \$82,680

OFFICE AND ADMIN SUPPORT WORKERS | \$24,690

Talent Supply for Key Positions

SOFTWARE DESIGN ENGINEERS

CURRENT SUPPLY | 18,440

Supply has grown by 14% since 2011

» Double the national growth

COMPENSATION | \$110,362

SPECIALIZATION | 46% more concentrated than average

SYSTEMS SOFTWARE DEVELOPERS

CURRENT SUPPLY | 8,155

Supply has grown by 17% since 2011

» Nearly triple national growth (6%)

COMPENSATION | \$115,731

SPECIALIZATION | 86% more concentrated than average

ENGINEERS (GENERAL)

CURRENT SUPPLY | 28,741

Supply has grown by 12% since 2011

» Five percentage points higher than national growth

COMPENSATION | \$102,172

SPECIALIZATION | 464% more concentrated than average

APPLICATIONS SOFTWARE DEVELOPERS

CURRENT SUPPLY | 10,286

Supply has grown by 12% since 2011

» Five percentage points higher than national growth

COMPENSATION | \$106,558

SPECIALIZATION | 22% more concentrated than average

Education: The Talent Pipeline

San Diego's higher education institutions conduct groundbreaking research, train the region's workforce and continue to work closely with corporate partners to understand and plan for future needs. UC San Diego has become one of the top five public universities in the world¹³ in a span of only 50 years. San Diego State University has educated more of San Diego's civic leaders than any other institution locally. Higher education institutions in San Diego have produced hundreds of thousands of qualified individuals and provide lasting economic impact through the creation of ideas, innovations and companies locally.

UC SAN DIEGO | 6,770 STEM DEGREES CONFERRED ANNUALLY | UC San Diego is recognized for pushing boundaries and driving innovation. UC San Diego students are educated by Nobel Laureates (5), MacArthur Fellows (1,382) and National Academy members (207).¹⁴ A one billion dollar research institution, the campus is recognized as one of the top 15 research universities in the world. More than 650 companies have been launched by or use technology developed by UC San Diego faculty, staff, students and alumni, including more than 200 active companies in San Diego that contribute an estimated \$32 billion to the local economy.¹⁵ Adding to its local impact, the university has an impressive track record of successful industry and educational partnerships in San Diego and more recently, Baja California.

#1 for female STEM graduates¹⁶

#2 in positive impact¹⁷

The Jacobs School of Engineering is ranked among the top 10 best programs in the country, and top 25 in the world for engineering, technology and computer science.¹⁸



SAN DIEGO STATE UNIVERSITY | 3,170 STEM DEGREES CONFERRED ANNUALLY¹⁹ | San Diego State University continues to gain recognition as a leader in higher education. SDSU's undergraduate international business program is among the top in the country, and the school is increasingly recognized as a hub for innovation. The diverse campus is representative of San Diego's diverse population, with many business and civic leaders as alums.

#7 nationally for ethnic diversity²⁰

#9 nationally for number of students who study abroad²¹

#12 international business program in the U.S.²²

UNIVERSITY OF SAN DIEGO | 655 STEM DEGREES CONFERRED ANNUALLY | University of San Diego sets the standard for an engaged, contemporary private university. The university provides a character-building education that fosters independent thought, innovation, integrity, analytical thinking and an open-minded and collaborative world view.

#9 Catholic colleges and universities in America²³

#12 best business schools for networking

We've got brains.
And beauty.

CALIFORNIA STATE UNIVERSITY (CSU)

SAN MARCOS | 741 STEM DEGREES CONFERRED ANNUALLY

With a 27-year history, CSU San Marcos is a forward-focused institution, dedicated to preparing future leaders, building great communities and solving civic and economic issues. This year, CSU San Marcos has welcomed its first cohort of engineering students in its newly founded engineering school. The program emphasizes skills in computer science.

#13 for preparing students for career success relative to cost²⁴

53% of graduates are first in their families to earn a BA

85% of alumni stay in the local community after graduation²⁵

JUNIOR/COMMUNITY COLLEGES | 2,775 STEM

DEGREES CONFERRED ANNUALLY | San Diego's community college system works collaboratively with regional employers to ensure that curriculum is consistently focused on skillset demand in our driving industries.

San Diego Community College District | 100,000 students annually

Grossmont Cuyamaca Community College District | 27,000 students each semester

Southwestern college | 20,000 students every semester

Palomar | 30,000 full-time and part-time students annually

MiraCosta | 15,000 students annually

San Diego Community Colleges and its graduates have a combined \$5.5 billion annual economic impact

Ninety-eight percent of its students remain in the region after graduation

The district also proudly serves more than 12,000 active-duty military personnel, veterans and dependents²⁶



K-12 Overview

The San Diego County Office of Education (SDCOE) supports 780 schools countywide and serves more than 500,000 students. SDCOE provides a variety of services for 42 districts, 124 charter schools and five community college districts in the county.

High Tech High Charter Schools: Developed by a coalition of San Diego civic leaders and educators, High Tech High (HTH) opened in September 2000 as a small public charter school with plans to serve approximately 450 students. HTH has evolved into an integrated network of 13 charter schools across the county, serving approximately 5,300 students in grades K-12 across three campuses. Eighty-seven percent of HTH alumni graduate from a post-secondary institution, with 34 percent of graduates earning STEM degrees – double the national percentage of U.S. STEM degree holders (17 percent).²⁷

At a glance.²⁸

3 San Diego County districts in the CA's top school districts

#5 best high school in CA (Preuss School)

#5 district in CA (San Dieguito Union High School District)

#10 district in CA (Poway Unified)

125+ charter schools

Transportation & Connectivity

Global Connectivity

Situated at the southwest tip of the state of California and the U.S., San Diego serves as a gateway to the Pacific. The location also provides a unique opportunity to leverage resources in Mexico, with Tijuana located 20 miles south of downtown San Diego.

To capitalize on the region's strategic location, elected officials and the business community have worked with a variety of key partners to increase our global connectivity. San Diego International Airport (SAN), is continually recognized as one of the best airports in the nation for travelers.²⁹ SAN serves 68 nonstop destinations, with 14 daily nonstop flights to Seattle/Tacoma on three airlines, as well as daily nonstop service to San Francisco, Austin and the D.C. area. Additional nonstop destinations include 10 international connections: Canada (Calgary, Toronto and Vancouver); Germany (Frankfurt); Japan (Tokyo-Narita); Mexico (Los Cabos San Lucas, Mexico City and Puerto Vallarta); Switzerland (Zurich); and The United Kingdom (London-Heathrow).

San Diego's proximity to Mexico grants individuals and companies an opportunity to leverage the Cross Border Xpress (CBX), the first true binational airport passenger terminal. CBX provides a direct pedestrian bridge from San Diego into Tijuana International Airport (TIJ). TIJ serves 32 nonstop destinations, with an additional international connection into Shanghai, China (PVG), often at more affordable rates.

Additionally, the San Ysidro border crossing (20 minutes from downtown San Diego) is the busiest land port of entry in the western hemisphere, with 135,000 northbound border crossings each day,³⁰ yielding an incredible flow of goods and qualified workers. As of June 2017, San Diego Association of Governments (SANDAG) and CalTrans, along with a number of key local, state and federal agencies in the U.S. and Mexico, have allocated funds to build a third port of entry in the San Diego-Baja region in order to dramatically reduce border wait times.

Tijuana has more than 1.7 million residents, making it the largest city in the State of Baja California. More than 45,000 students are enrolled in bachelor degree programs, with close to 20 percent of those in engineering. Further emphasizing our cross border collaboration, several Baja universities have dual degree programs with San Diego-based universities. A large portion of the population is bilingual, bicultural and some binational, visiting San Diego and the U.S. frequently.



In recent years, the rise of the Tijuana's innovation cluster is proof of its diversifying economy. In 2016, global biotechnology giant Thermo Fisher, with a massive software and development center in San Diego County, cut the ribbon on a worldwide software center of excellence in Tijuana. Since its opening, Thermo Fisher has benefited from a more efficient supply chain processes, fewer communication barriers and improvements in collaboration between teams on both sides of the border.

Regional Transportation

Regional economic success is directly dependent on an efficient transportation network. San Diego has demonstrated a commitment to transportation infrastructure that increases connectivity while reducing emissions. Among peer metros, San Diego has the third lowest commute time of only 26.1 minutes.³¹ The San Diego International Airport is within 45 minutes, on average, of anywhere in the county. San Diego has seen a 60 percent increase in bike commuters since 2005³² and the City of San Diego's Climate Action Plan calls for an increase of an additional 18 percent by 2035.

San Diego also offers a variety of public and private transit options. From the Metropolitan Transit System (MTS) and North County Transit District (NCTD) bus, Bus Rapid Transit (BRT) and light rail trolley and Sprinter systems to the heavy gauge Coaster and Amtrak; to Lyft, Uber and FRED (Free Rides Everywhere Downtown); to bike share programs DecoBike and Lime Bike, there are a number of multi-modal opportunities to navigate the San Diego region. By 2021, San Diego trolley's UC San Diego Blue Line will extend from the U.S.-Mexico border to the main campus in La Jolla, adding nine new stops, including UTC where Amazon's current development office is.³³ Amtrak also offers convenient rail access to Irvine, Los Angeles and beyond with 13 trains (each way), daily. The Coaster provides rail access between North County cities and Downtown 11 times (each way) daily and connects with the trolley at two different stations.



In Chula Vista, construction of a new Millenia Station is underway and expected to be completed by 2018. The Millenia Station will provide nearby residents with access to South Bay Rapid service beginning in 2018.

Preparing for Autonomous Transportation

San Diego is preparing for future of autonomous transportation by exploring national and local partnerships. Recently SANDAG, CalTrans and the City of Chula Vista were selected by the Department of Transportation to become one of ten designated proving grounds for autonomous vehicles in the nation. The test site has received strong support from elected officials, major automotive manufacturers, and local tech companies because of the unique opportunities to test in real world settings.

(Average) Regional Commute Times

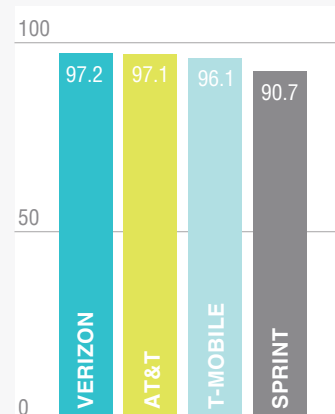
	Downtown San Diego		San Diego International Airport		University Of California San Diego		CBX Cross-Border Terminal	
	Car	Transit	Car	Transit	Car	Transit	Car	Transit
Downtown San Diego	-	-	10 min	15 min	16 min	42 min	27 min	1 hr 38 min
Mission Valley	17 min	26 min	17 min	52 min	17 min	49 min	29 min	1 hr 53 min
Chula Vista*	26 min	1 hr 34 min	26 min	1 hr 57 min	33 min	2 hr 24 min	16 min	2 hr 21 min
Otay Mesa	25 min	1 hr 1 min	27 min	1 hr 23 min	33 min	2 hr	8 min	27 min

* Current development of BRT between Chula Vista and Downtown San Diego is expected to greatly reduce the commute time between the two locations.

Digital Connectivity

The birthplace of CDMA technology, San Diego is well connected. Both Verizon and AT&T wireless coverage reliability exceeds 97 percent, while T-Mobile and Sprint both have reliability above 90 percent. 4G LTE coverage spans the entire region, and the cities of San Diego and Chula Vista are currently working with Verizon on the future roll out of 5G coverage. Downtown, Mission Valley and Chula Vista sites all have current fiber connectivity at or easily upgradable to or above 100GB. (In Otay Mesa, one parcel is not yet fiber connected but can be upgraded to have connectivity ahead of the development timeline for phase three.)

San Diego Coverage Comparison 2016



Data compiled from independent sources
Average reliability compiled from multiple 3rd party sources including RootMetrics, Open Signal, FCC and others

Community & Quality of Life

Consistently ranked in the top ten healthiest³⁴, fittest³⁵ and most livable³⁶ regions in the country, San Diego residents enjoy an average year-round temperature of 64 degrees, 70 miles of coastline and 3,055 hours of sunshine annually. With a booming craft beer and food industry, diverse culture and a true “city of villages” vibe, San Diego has something for everyone – and our quality of life is unmatched.

The region’s geographic diversity also allows residents to choose from a variety of lifestyles – from urban high-rises with walkable neighborhoods, coastal beach communities to suburban neighborhoods with distinct personalities, small town centers or wide-open spaces with rural charm.

Many executives, senior leaders and engineers at tech and life sciences firms throughout the county choose to live in San Diego’s sprawling North County. Home to 19 golf courses and the highest concentration of breweries in the state, local residents enjoy active lifestyles and unique cultural amenities, adding to the vibrancy of the region. Although no sites are located in this area, Rail, BRT and highway infrastructure improvements ensure that this workforce is able to reach any of the proposed sites quickly.

ARTS & CULTURE | San Diego has a vibrant arts and culture scene that celebrates the history and diversity of our region. San Diego’s historic Balboa Park is made up of 1200 acres of land (358 acres larger than Central Park in NYC), which includes 15 major museums, numerous arts and international culture associations, and nearly 20 beautiful and unique gardens. The Tony Award-winning Old Globe Theater, located in Balboa Park, produces 14 shows a year with 550 performances. The La Jolla Playhouse has merited more than 300 major honors, including 35 Tony Awards for its 28 productions that have gone to Broadway, including two awards in 2017. Performing more than 120 concerts annually, the San Diego Symphony Orchestra is more than 100 years old and is designated as a Tier 1 Orchestra by the League of American Orchestras. Another top tourist destination, the San Diego Zoo, is a world-famous conservation organization that houses more than 4,000 rare and endangered animals. In recent years, San Diego has come to be a craft beer capital of the world, with more than 150 breweries and hundreds of award winning beers appealing to tourists and locals alike. In 2016, Stone Brewing became one of the first U.S. craft brewers to open operations in Europe.



At a glance.

150+ breweries³⁷

93 golf courses³⁸

6,500 farms

50+ farmers market³⁹

#7 happiest place to live⁴⁰

#10 most well-read city⁴¹

#3 best children's hospitals⁴²
(Rady Children's Orthopedics)

#6 best large American cities⁴³

#6 major American cities of
the future⁴⁴

ENVIRONMENTALLY RESPONSIBLE | Cities throughout the region have adopted leading Climate Action Plans (CAP) in pursuit of renewable energy and reduction of greenhouse gas emissions. These efforts are complements by the State of California's aggressive stance on reducing its carbon footprint. In 2015, City of San Diego Mayor Kevin Faulconer, in partnership with environmental groups, business and community leaders, announced one of the most robust, progressive CAPs in the country. With the goal of creating a cleaner San Diego for future generations, the City of San Diego's CAP calls for eliminating half of all greenhouse gas emissions in the city and aims for all electricity to be from renewable sources by 2035. The CAP is a package of policies that will benefit San Diego's environment and economy through the creation of new jobs in renewable energy, improvements to public health and air quality, water conservations and cleaner energy production. San Diego is the largest U.S. city to adopt a 100 percent renewable electricity goal.

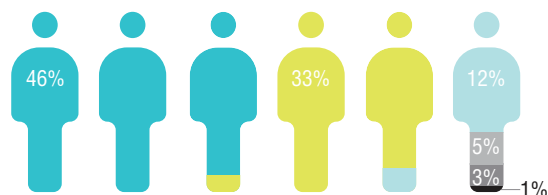
MAXIMIZING OUR POTENTIAL | As a region, San Diego is working earnestly to ensure that our entire population has the necessary tools to succeed in our economy. Through work with the Brookings Institution, regional stakeholders are developing plans to close the achievement gap of minority populations, address housing cost challenges and ensure that small businesses are competitive in an economy focused on innovation. Moving forward, this is a key priority for local economic development organizations, business leaders, civic leaders and community stakeholders, all of whom are working together to maximize the potential of San Diego's population. Many communities that have been traditionally underrepresented provide a growing opportunity to expand the region's talent pool, giving San Diego a competitive edge in our innovation economy.

CELEBRATING DIVERSITY | The San Diego region embraces diversity and individuality. In San Diego County, 39 percent of the population is multilingual. San Diego ranks fifth out of cities with a population more than 300,000 when evaluating ethno-racial, linguistic and region-of-birth diversity.⁴⁵ Together, these populations from around the world create a tapestry of cultures that is embraced locally. In 2010, San Diego became a majority minority county, where no single ethnic group makes up more than 50 percent of the population.

More than America's Finest.

Diversity by the Numbers

SAN DIEGO COUNTY



White	Black
Hispanic	Two or More
Asian	Hawaiian or Pacific Islander

With one of the largest Pride celebrations in the country (230,000 attendees in 2017⁴⁶), San Diego attracts visitors from around the country to recognize individuality and freedom of expression. San Diego Pride incorporated as a nonprofit organization in 1994 and today, continues to bring together the skills, talents and vision of our diverse community through numerous programs. Adding to this inclusive culture, UC San Diego was ranked among the nation's top ten public universities for LGBTQ students in 2016. The LGBTQ community receives strong support from numerous local politicians, several of them openly gay and lesbian, plus a large variety of businesses and civic organizations. Hailing from San Diego, California State Senator Toni Atkins was the first female LGBTQ speaker of the California Assembly, and is a powerful advocate for women, the LGBTQ community and a champion for veterans, individuals and families experiencing homelessness.



At a glance.

3.3M

Population (2016)
»13% increase since 2006

35.5

Median age

27.2%

% of population 18-34

24.2%

% of population born outside U.S.

Housing, Crime,

Cost of Living Data

Today, there are approximately 1.2 million housing units in the region, with nearly half located in the City of San Diego. Roughly 60 percent of the housing stock in the region is single-family and the median home price is \$605,000.⁴⁸

A strong local economy will continue to influence population growth and the demand for new housing. While the region is constrained in terms of greenfield opportunities for new housing development, San Diego cities are proactively modifying land use plans to encourage more mixed-used development and infill with the objective of providing a variety of housing options to meet the need of the region's diverse workforce.

Primarily single-family neighborhoods today, new development is expected to increasingly come in the form of high-rise condominiums, townhomes and row homes in vibrant urban areas. Increased emphasis is being placed on enhanced connections between housing, employment and transportation; many of these new developments are located in close proximity to major employment centers and benefit from a variety of transportation options. The goal is to enable workers and residents to spend less time in the car commuting and more time enjoying regional amenities, ultimately enhancing quality of life. In the future, 87 percent of growth is projected to be within a half mile of transit.

Given the higher cost of housing, the overall cost of living for San Diego is roughly 41 percent above the national average. This is similar, however, to many of the larger metropolitan areas across the nation where real estate costs tend to be greater. It is important to note that the cost of food, utilities and healthcare, tend to be closer to the average.

Regarding crime, San Diego ranks as the 22nd safest out of the top 100 metropolitan areas, and third in California. San Diego is the second safest city among populations of more than 500,000, and the City of Chula Vista ranks 10th safest city in America.⁴⁹ The City of Carlsbad, located in North County, ranks the 7th safest place to live in the country.⁵⁰

SD COST OF LIVING INDEX	141.1
HOUSING	223
TRANSPORTATION	132
FOOD	113
UTILITIES	113
HEALTHCARE	108
MISC	102



In Closing

Partners throughout the region are dedicated and willing to work with Amazon to find the HQ2 site solution that will lead to long-term prosperity. The state, county and cities understand that a strong and supportive culture is key to enabling growth for Amazon, and all those (companies and residents) who calls this place home. We look forward to working with Amazon to ensure a reliable and business-friendly environment is built on a foundation of *trust* and collaboration. Whether Amazon is seeking a campus within a growing urban core, a vibrant central zone, a suburban community, or a border-adjacent site with immediate access to the growing Mexico market, San Diego presents a diverse array of options and opportunities to thrive here.

In San Diego, we work for and create companies that believe in changing the world. We're finding cures for diseases, improving communication and connectivity across the globe, brewing America's finest beer and doing it all while surfing on our lunch break. Here, changing the world isn't just a pipe dream - it's a reality. Here, you're part of something bigger. That's San Diego, and that's Amazon.

SAN DIEGO » AMAZON » HQ2

Endnotes

- ¹ Bureau of Economic Analysis, 2016
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- ¹¹ Innovation Report, CONNECT, 2016
- ¹² Emsi, Occupation Snapshot Report, 2017
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- ¹⁵ University Communications and Public Affairs, UC San Diego, 2017
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- ¹⁷ Washington Monthly, College Guide and Rankings, 2017
- ¹⁸ Academic Ranking of World Universities, Engineering/Technology and Computer Sciences, 2016
- ¹⁹ EMSI, 2017
- ²⁰ Campus Ethnic Diversity, U.S. News and World Report, 2017
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- ²⁹ Best and Worst Airports in the US, The Points Guy, 2016
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- ³⁶ WalletHub, 2015
- ³⁷ San Diego Tourism Authority, 2017
- ³⁸ San Diego Tourism Authority, 2016
- ³⁹ San Diego Tourism Authority, 2016
- ⁴⁰ Happiest Places to Live, WalletHub, 2017
- ⁴¹ Most Well-Read Cities, Amazon, 2017
- ⁴² U.S. News & World Report, 2017
- ⁴³ 50 Best Large American Cities, Resonance Consultancy, 2017
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- ⁴⁵ WalletHub, 2015
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- ⁴⁹ Universal Crime Rate Index, FBI, 2017
- ⁵⁰ Safest Cities in America, Niche, 2017

Appendix A

SAN DIEGO » AMAZON » HQ2

S/D



OFFICE OF THE GOVERNOR

October 11, 2017

Jeffrey Bezos
1200 12th Avenue South
Suite 1200
Seattle, WA 98144

Dear Mr. Bezos,

I write to encourage you to give careful consideration to the many California cities interested in becoming the next home for Amazon's newest headquarters.

Having already invested in new facilities in our state, and partnered with us on smart public policy solutions, Amazon knows firsthand what California has to offer – but it bears repeating.

The Golden State is home to the best universities and research institutions in the world, a uniquely qualified and talented workforce and the most dynamic combination of innovation and investment on the planet. In fact, more than half of all venture capital investment flows to California and more than a quarter of all new patents in America originate here. We also lead the nation in manufacturing output and jobs.

Beyond these strengths, we have a government in California that works – and our public investment in infrastructure and affordable housing solutions is unparalleled. In recent months I signed landmark legislation – passed by supermajority votes in the State Legislature – to help increase the supply and affordability of housing in California and invest \$54 billion in our roads over the next ten years. We are also building the country's only high-speed rail system.

These are among the many reasons why 53 Fortune 500 companies are headquartered in cities across the state and why 24 of the 100 fastest growing companies – including four of the top ten – call California home. Put simply: there is no better place for a business like yours to continue to grow.

I look forward to speaking with you about how we can work together to bring Amazon's newest headquarters to California.

Sincerely,

A handwritten signature in black ink, reading 'Edmund G. Brown Jr.' with a stylized flourish at the end.

Edmund G. Brown Jr.

STATE CAPITOL
ROOM 4072
SACRAMENTO, CA 95814
TEL (916) 651-4039
FAX (916) 651-4939

DISTRICT OFFICE
1350 FRONT STREET, SUITE 4061
SAN DIEGO, CA 92101
TEL (619) 645-3133
FAX (619) 645-3144

SENATOR.ATKINS@SENATE.CA.GOV

California State Senate

SENATOR
TONI G. ATKINS

THIRTY-NINTH SENATE DISTRICT

COMMITTEES

HEALTH
LABOR & INDUSTRIAL RELATIONS
NATURAL RESOURCES & WATER
RULES
TRANSPORTATION & HOUSING



October 10, 2017

Mr. Jeff Bezos
Chairman & CEO Amazon
Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos:

I write as the State Senator who represents the urban core of the greater San Diego region, 6 years in the California State Assembly including serving as Speaker, and 8 years on the San Diego City Council, in strong and unequivocal support of the Request for Proposal submitted by the San Diego region for a second corporate headquarters for Amazon.

Our region is an uncommon blend of high tech and biotech innovative industries. These industries are driving the American economy creating new technologies, medical breakthroughs, multiple educational institutions that graduate talented designers who help make our state the 6th strongest economy in the world. With approximately 60 percent of Marine personnel and equipment assigned to our region and within a couple of years 60 percent of the Navy's personnel, we value the presence of our military.

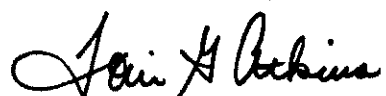
All this in a setting where sustainability and a commitment to a green economy is a driving force with our region having the highest number of solar power installations in the country. We cherish our beaches, bays and wildlife to the extent that the City of San Diego has permanently set aside 55,000 acres of open space within its boundaries. Quality of life is a priority for our region.

As a senior member of the State Legislature, I would welcome having Amazon as a corporate citizen in our region. I work closely with the various industries in our state to better understand their concerns and needs and how the state government can be supportive.

Page 2

I moved to San Diego from Virginia over 35 years ago and I assure you it was the best decision I ever made. Our region would welcome the addition of Amazon to our community.

Warmly,

A handwritten signature in black ink, reading "Toni G. Atkins". The signature is fluid and cursive, with the first name "Toni" being more prominent than the last name "Atkins".

TONI G. ATKINS
Senator, 39th District

TGA:ds



Serving the cities of:
 El Cajon
 La Mesa
 Lemon Grove
 Poway
 Santee

Serving the communities of:
 Agua Caliente
 Allied Gardens

Alpine
 Barrett

Blossom Valley
 Bonita

Boulevard
 Campo

Canebrake
 Casa de Oro

College Area
 Crest

Cuyamaca
 Delcisa

Del Cerro
 Descanso

Dulzura
 Encinitas Hills

Fernbrook
 Finn Springs

Granite Hills
 Grantville

Guatay
 Harbison Canyon

Jacumba
 Jamul

Johnstown
 Julian

Lake Morena
 Lakeside

Mount Helix
 Pine Hills

Pine Valley
 Potrero

Ramona
 Rancho San Diego

Rolando
 San Carlos

San Pasqual
 Santa Ysabel

Shelter Valley
 Spring Valley

Tecate
 Tierra del Sol

Vallecitos
 Wnola

Serving the Indian
 reservations of:

Barona

Campo

Cosmit

Ewilaapaayp

Inaja

Jamul

La Posta

Manzanita

Mesa Grande

Santa Ysabel

Sycuan

Viejas

DIANNE JACOB

CHAIRWOMAN, SECOND DISTRICT
 SAN DIEGO COUNTY BOARD OF SUPERVISORS

October 12, 2017

Mr. Jeff Bezos
 Chief Executive Officer
 Amazon.com, Inc.
 2121 7th Avenue
 Seattle, WA 98121

Dear Mr. Bezos:

On behalf of the San Diego County Board of Supervisors (Board), I write to express this Board's strong support for your consideration of the San Diego region for the Amazon second corporate headquarters, and to share the County's willingness to explore incentives to bring the Amazon second headquarters to the San Diego region.

The San Diego Regional Economic Development Corporation (SDREDC) is coordinating a regional response to the Request for Proposals (RFP), working with business and community leaders, as well as local cities and the County, to put together a proposal that will include several site options and a regional overview per the data requested by the RFP. San Diego County boasts an unmatched quality of life for residents, with an enviable climate year-round, world-class beaches, and vibrant neighborhoods booming with small businesses, restaurants, cultural institutions, and parks that reflect our region's unique character. San Diego also offers a robust talent pool in its active life sciences, telecommunications, and cybersecurity clusters, and provides strategic placement for trade due to its proximity to the busiest land border crossing in the Western Hemisphere. San Diego already has an Amazon presence, with your company having recently leased space for 500 employees in the region, and our Board believes that a San Diego based second corporate headquarters for Amazon would be a good fit for both our community and your business.

The Amazon second corporate headquarters represents an important opportunity for this region, and our Board respectfully encourages your consideration of the SDREDC response. If I can be of any assistance, please contact me at (619) 531-5522.

Sincerely,

DIANNE JACOB
 Chairwoman

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E-MAIL

Assemblymember.Gloria@assembly.ca.gov

Assembly California Legislature



TODD GLORIA

ASSISTANT MAJORITY WHIP

ASSEMBLYMEMBER, SEVENTY-EIGHTH DISTRICT

COMMITTEES
AGING AND LONG-TERM CARE
EDUCATION
GOVERNMENTAL ORGANIZATION
VETERANS AFFAIRS
WATER, PARKS, AND WILDLIFE

October 16, 2017

Jeffrey Bezos, Chairman, President, and CEO
Amazon.com Inc.
1200 12th Ave. South, Suite 1200
Seattle, WA 98144-2734

Dear Mr. Bezos:

As the Assemblymember for California's 78th District, I am writing to express my strong support for San Diego's proposal, and to convey my eagerness to work creatively with your team to support Amazon's growth in San Diego. Our region is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts. I believe this makes us an ideal location to establish a second headquarters operation for Amazon.

In my role as Assemblymember I have been pleased to assist local businesses, both large and small, through the state legislative process via advocacy and legislation when necessary. You can be assured of my full commitment to partner with Amazon to appropriately navigate any state hurdles that may arise as you expand in San Diego.

San Diego County not only meets and exceeds your criteria, but provides Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality-of-life, world-class research institutions, and growing pools of top notch technical talent. I appreciate Amazon's existing commitment to San Diego, and look forward to working with your team to ensure that our community supports Amazon's future growth.

Sincerely,

A handwritten signature in blue ink that reads "Todd Gloria".

TODD GLORIA
Assemblymember, 78th District



Printed on Recycled Paper



KEVIN L. FAULCONER

MAYOR

October 12, 2017

Jeff Bezos
President, CEO and Chairman
c/o Site Manager Golden
Office of Economic Development
Amazon
2121 7th Avenue
Seattle, WA 98121

Dear Mr. Bezos,

The City of San Diego is excited for the opportunity to partner with Amazon to expand its North American operations. As one of the most creative and innovative cities in the nation, I am confident that Amazon's second headquarters will feel right at home in San Diego.

San Diego is the perfect home base for HQ2. We have the resources, talent, lifestyle and innovative economy that will help Amazon grow and your employees thrive.

We can make available the incentives and resources you need to develop HQ2 here. Our region has assembled a team that will work across government agencies to meet your needs. San Diego is unique among major cities in that it has several site options that can accommodate a large employer in any configuration of Amazon's choosing, from a downtown environment to a master planned campus. We are also prepared to discuss creative solutions related to taxes and permitting fees.

San Diego's skilled workforce powers some of the world's most successful businesses and academic entities. Our region is home to 3.3 million people, six universities and more than eighty research institutions. Thousands of entry-level graduates enter San Diego's workforce every year. We also offer experience: more than a third of San Diegans hold a Bachelor's Degree or higher, over 40 percent graduated as science or engineering majors, and nearly one in four speak at least one language in addition to English.

In San Diego, you can truly love where you work. From magnificent beaches to world-famous breweries to family-friendly neighborhoods to vibrant urban centers, San Diego's lifestyle is second to none. Our extensive transit system offers easy connections to local employment centers. And our quality schools, parks and outdoor amenities make it easy for San Diego-based companies to recruit top-tier talent from around the world.





KEVIN L. FAULCONER

MAYOR

As the hometown to revolutionary entrepreneurs and businesses, Amazon will be in good company in San Diego. We're a city built on local innovations and global connections. San Diego is where new wireless technologies are pioneered, breakthroughs in unmanned and autonomous robotics take flight and cyber security engineers protect our modern world. Our proximity to the southern U.S. border and the Pacific offer businesses unparalleled access to economic partners in Mexico, Asia and beyond.

We also proudly embrace a culture of sustainability. In 2015, San Diego became the largest American city to commit to 100 percent renewable energy. Our ambitious Climate Action Plan is working to make more green infrastructure and technology available to San Diego's residents and businesses alike.

You can have it all in San Diego – the lifestyle your employees want, the talent pool your company needs, all in a city that embraces the same innovative spirit your customers expect. We stand ready to work with you to explore every solution and overcome any barrier to help Amazon join the San Diego community. I invite you to pair your Seattle latte with a San Diego craft IPA, trade in your umbrella for a beach towel, and join us here in America's Finest City.

Sincerely,

A handwritten signature in blue ink, reading "Kevin L. Faulconer", with a long, sweeping horizontal line extending to the right.

Kevin L. Faulconer
Mayor





OFFICE OF THE MAYOR

Mary Casillas Salas

September 25, 2017

Welcome home Amazon!

We have spent the last 30 years putting the planning in place that will accommodate your future home. Our city is a leader in sustainability which started with the adoption of our first Climate Action Plan in 2000, being recognized in 2014 by the Environmental Protection Agency with a Climate Leadership Award and in 2015 at the United Nations Conference of Parties (COP21) in Paris. We now are striving to become a Smart City leader that embraces the Internet of Things and provides a higher level of service to our community.

You will instantly recognize Amazon ideals in Chula Vista because we are customer-focused; our customers just happen to be our residents and businesses. We embrace research and invention, evidenced by our role as one of 10 proving grounds for autonomous vehicles as well as providing a site for the region's UAV's to test on our 375-acre university property. In 2018, we will begin our pursuit for a new four-year multi-institutional, binational university campus that will provide a pedagogy that supports industry. We dream of a university that is integrated with industry so much so that classes could be held on the second floor while industry and internships are happening on the third, fourth and fifth floors. We want a university that prepares students to enter the workforce the day they graduate, regardless of what country they come from.

Chula Vista is proud to be the most ethnically diverse community in San Diego, a tremendous asset that makes us the choice location for entrepreneurs. We share your culture of innovation and an eagerness to invent and pioneer.

The seeds are planted and the infrastructure is in place with zoning that will allow you to grow to 8 million square feet. We can deliver Phase I (500,000+ square feet) by 2019 and additional phases by 2020. As you grow, the housing and community around Amazon HQ2 Chula Vista will also grow, providing every employee an opportunity to live within walking and biking distance of their offices and amenities. We have the property and vision to secure a new four-year multi-institutional binational university campus, with your partnership, that will educate your current and future workforce.

This is an opportunity unlike anywhere in the country for you to develop an Amazon Village that embraces your corporate culture of innovation, passion, intelligence and creativity. Chula Vista is the only place where you can immediately develop Amazon Village for your employees to live, work and play adjacent to your new HQ2 and the university you help to create.

We are excited to have you become a part of our community.

Sincerely,

A handwritten signature in blue ink that reads "Mary Casillas Salas".

MARY CASILLAS SALAS
Mayor



OFFICE OF THE CHANCELLOR

9500 GILMAN DRIVE # 0005
LA JOLLA, CALIFORNIA 92093-0005
TEL: (858) 534-3135
FAX: (858) 534-6523

October 11, 2017

Dear Mr. Bezos,

On behalf of the University of California San Diego, I write to express the university's commitment to our community and our willingness to work creatively with your team to support Amazon's growth in San Diego. It is with great pride and pleasure that I support San Diego's proposal to serve as the ideal location to establish a second headquarters operation for Amazon. San Diego County is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts.

UC San Diego is the leading employer in San Diego County, contributing \$4.6 billion and 37,000 jobs to the local economy. We are also the primary pipeline in the region for university graduates, with a current enrollment of more than 35,000 undergraduate and graduate students, and for the past three decades have been the engine for the region's high-tech and biotech industries, leading to the development of more than 700 UC San Diego related companies. Each year our campus creates more than 40 companies and licenses over 100 technologies to companies. This month our campus spearheaded the formation of the San Diego Innovation Council, a new group designed to promote commercialization of local innovations, investment and new company formation in the region. And last month, the scientific journal *Nature* ranked UC San Diego the 14th best university in the world for research activities that create products or services that benefit society and spur economic growth.

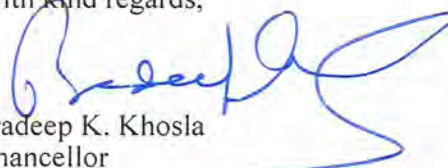
Our campus and Amazon have developed deep research partnerships in machine learning, artificial intelligence, data analytics, and autonomy that would be further strengthened through your presence in San Diego. Members of our faculty currently serve as Principal Applied Scientist at Amazon, leading machine learning at Amazon Music, and as Amazon Fellow and Director of Amazon's central machine learning team. Other faculty members are recipients of Amazon Academic Research awards, consultants, and speakers at Amazon MARS events (Machine Learning, Artificial Intelligence, Robotics and Space) working toward the implementation of machine learning models of human behavior and personalized recommender systems, creating novel methods for query and integration of semi-structured data, and developing vision-based automation.

Last month, we signed a \$10 million contract with IBM to enhance quality of life and independence for aging populations through the new Artificial Intelligence for Healthy Living Center located on our campus. We are also in the process of establishing a \$70 million Data Science Institute on the campus that will include training and educating—at all levels—the next generation of leaders in this emerging discipline. With a comprehensive Extended Studies program with certificate programs for emerging technologies and a top-ranked engineering and business school, we can also offer your company many opportunities for workforce development.

A unique and compelling aspect of our Rady School MBA is our lab to market core sequence where all students begin with an idea and evolve it into a viable business opportunity, learning the critical steps of developing and commercializing a company or product. Our specialized masters, including Master of Science in Business Analytics and Master of Finance, are highly analytical and provide students with the skills necessary to excel in an innovation driven industry. Multiple opportunities exist for Amazon to leverage a Rady School relationship for capstone projects or internships, where the company can experience first-hand the skills that can be put to use within their organization to solve timely business issues. In addition, a top tier local business school will provide a rich recruiting environment for talented executives.

UC San Diego believes that San Diego County not only meets and exceeds your criteria but provides Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality of life, world-class research institutions, and growing pools of top notch technical talent. We appreciate Amazon's existing commitment to San Diego, and we look forward to working with your team to ensure that our community supports Amazon's future growth.

With kind regards,



Pradeep K. Khosla
Chancellor



San Diego State University
5500 Campanile Drive
San Diego, CA 92182-8000
Tel: 619 594-5201
Fax: 619 594-8894

THE PRESIDENT

October 13, 2017

Dear Jeff Bezos,

As president of San Diego State University, I am writing to you today to express the university's commitment to this community and our willingness to work creatively with your team to support Amazon's growth in San Diego. It is with great pride and pleasure that I write to you in support of San Diego's proposal to serve as the ideal location to establish a second headquarters operation for Amazon. San Diego County is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts.

San Diego State University has been a partner in the economic health and vibrancy of the San Diego region for 120 years. We enroll approximately 36,000 students annually. Sixty percent of our graduates remain in the San Diego region and are leaders in commerce, industry, engineering, bio-tech, education and government.

We were recently named the Model Undergraduate Entrepreneurship Program in the country and rank among the top 25 universities in the nation for entrepreneurship. These recognitions are in part due to university-wide efforts to provide the infrastructure and educational support for students who wish to begin their own businesses, and dovetails with San Diego's strength as one of the best cities for startups.

We would be an outstanding partner with Amazon in areas of business development providing interns and graduates ready to work immediately upon graduation. Our Fowler College of Business is known for its outstanding alumni in management and finance. Through our internships and mentoring programs, we are partners with businesses throughout San Diego, including Northrup Grumman, SDG&E/Sempra Energy, Microsoft, Cymer and many more.

San Diego State University believes that San Diego County not only meets and exceeds your criteria but provides Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality of life, world-class research institutions, and growing pools of top notch technical talent. We appreciate Amazon's existing commitment to San Diego, and we look forward to working with your team to ensure that our community supports your Amazon's future growth.

Sincerely,

Sally Roush
President



Caroline Winn
Chief Operating Officer

P.O. Box 129831
San Diego, CA 92112

Tel: 858.650.6175
Fax: 858.385.3939
CWinn@SempraUtilities.com

October 12, 2017

Amazon
Office of Economic Development
c/o Site Manager Golden
2121 7th Avenue
Seattle, WA 98121

Re: Amazon Corporate Headquarter Place Selection

Dear Office of Economic Development & Selection Team:

We are honored Amazon is considering San Diego as the potential home for your new Corporate Headquarters! San Diego Gas & Electric Company (SDG&E)'s current offerings and vision for an innovative energy future are more reasons why San Diego can add value to Amazon's mission and vision. As San Diego's energy provider, SDG&E has a track record that directly aligns with key issues of importance to Amazon. Amazon's corporate responsibility report identifies several areas of focus that SDG&E and the region have taken a significant leadership role on. We think our regional work in sustainability and clean energy uniquely qualifies Amazon to have a strategic and long-term fit in San Diego.

- Amazon has set an aggressive goal of being powered by 50% **renewable energy**. We at SDG&E think clean air is a good thing, and have built a grid to facilitate that.
 - In 2016, SDG&E delivered 43% renewable energy to our customers, and expects to deliver nearly 50% over the next several years. This portfolio does not include rooftop solar, and is facilitated by more than 60, steel-in-the-ground and greenhouse gas reducing renewable projects.
 - For customers who want to go above and beyond SDG&E's current renewable generation portfolio, SDG&E offers customers like Amazon two green power programs.
 - Our EcoChoice program is available at a nominal cost, to achieve up to 100% renewable energy for Amazon's energy requirements. Hundreds of customers have enrolled in this green choice.
 - Our Share the Sun program would work directly with Amazon to facilitate the construction of additional wind and solar projects to meet Amazon's energy needs.

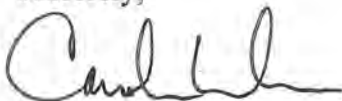
- It's important to note that SDG&E has been able to integrate this high level of renewable energy, and still maintaining our status as the most reliable utility in the Western United States – we know reliability is key to the 24/7 nature of Amazon's business.
- Amazon is focused on **innovative industry partnerships** around sustainability, and building retrofits. SDG&E will help lead this.
 - SDG&E offers the potential to integrate the management of increased distributed and utility-scale renewables and energy efficiency with advanced, innovative technologies. We can offer our expertise to help develop microgrids in our region, as we have constructed the world's largest lithium-ion battery energy storage center.
 - SDG&E is currently authorized to install up to 166MW of additional energy storage in our service territory, and can allocate a portion of this to assist meeting the needs of Amazon.
- Amazon has taken a leadership role in **retrofitting buildings with energy efficiency**, with an impressive track record of saving 50,000 MWh through low and no-cost energy savings. We can help even more.
 - SDG&E has built a large portfolio of energy efficiency offerings that over the past three years alone have saved more than 900 million KWh and 7.6 million therms of natural gas. For existing buildings, SDG&E's Comprehensive Audit Program provides those who qualify with a no-cost, high-level energy audit and analysis conducted by Trade Professionals and top-tier engineering talent.
 - Additionally, as buildings are constructed – our Savings by Design program will work with your engineers and architects to plan the building with the latest in energy efficiency technologies.
 - Another major focus of SDG&E is to make electric vehicle charging available to all San Diegans. The goal is to reduce harmful emissions, promote the use of EV charging with power from the wind and sun, and to establish San Diego as America's EV and clean energy capital.
 - SDG&E is installing 3,500 charging stations in multi-family developments and workplaces, through our Power Your Drive program, which is one of the largest transportation electrification programs in the country, and already more than 500 property owners have joined our interest list.
 - The placement of electric charging units on the campus of Amazon would allow employees to embrace the electric vehicle expansion movement and would also allow Amazon to transition other vehicle components such as delivery vans and operations equipment to electric further emphasizing their commitment to a clean energy operation.
- Amazon would have full access to **concierge level energy management services**.

- As a strategic customer in our region, you will benefit from the expertise of an assigned Account Executive (AE), who would be Amazon's one-stop shop to SDG&E's 4,000 employees.
 - There is no need to navigate the energy business on your own. Your AE will be your direct conduit to SDG&E programs and services and will be able to connect you with subject matter experts when needed, with the goal of becoming your trusted energy advisor. Matters ranging from regulatory updates to billing inquiries to infrastructure needs will be answered by your dedicated and full-service AE.

If given the opportunity to support and empower the Amazon construction team, we will focus on the creation of an award-winning showcase project that could include a platinum LEED headquarters building. We would also stress the importance and value of creating an innovative campus environment. SDG&E envisions aspects like electric vehicle service stations to build on the progress identified above, and where Amazon employees would be able to learn about the latest home energy options and programs available. If Amazon chooses San Diego, it will give us an opportunity to work with your team to create a project that embodies the latest in corporate campuses around the country while enabling projects never seen before.

In summary, SDG&E has a track record that directly aligns with what is important to Amazon. We stand at the ready to support Amazon's goals in renewable energy, innovative energy technologies, clean transportation and sustainability.

Sincerely,



Caroline Winn
Chief Operating Officer

CC: Mark Cafferty
President & Chief Executive Officer
San Diego Regional Economic Development Corporation



October 9, 2017

Mr. Jeff P. Bezos
Chief Executive Officer, President and Chairman of the Board
Amazon.com, Inc.
410 Terry Avenue N.
Seattle, WA 98109

Dear Mr. Bezos:

San Diego is a truly unique place. Whereas, most metro areas in the US had given up on their urban cores and pushed city development outward, San Diego has embraced its compactness and urbanity. So many metro areas are cities without a true core. San Diego has always embraced its core and has invested heavily in making the city a great region to live, work and play.

The San Diego International Airport is a world gateway in the city center. Located a mere 3 miles from downtown San Diego, we are arguably the most convenient major international airport to a city center in the nation. We stand ready with other civic and other stakeholders to work creatively with your team to support Amazon's growth in San Diego.

San Diego has so many excellent demographic, economic, geographic and climatic characteristics that would serve as a competitive advantage for Amazon's second headquarters location. San Diego County is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts.

San Diego International Airport in particular offers the following competitive features for Amazon's staff and client access:

- San Diego International Airport has 14 daily nonstop flights to Seattle/Tacoma on three (3) airlines.
- San Diego International Airport has 10 daily nonstop flights to the New York metro area on five (5) airlines.
- San Diego International Airport has 50 daily nonstop flights to the San Francisco Bay area on four (4) airlines.
- San Diego International Airport has seven (7) daily nonstop flights to the Washington, DC area on four (4) airlines.
- Over 80% of San Diego International Airport's domestic passengers have nonstop flight options.
- San Diego International Airport is served by every major domestic airline and eight airlines flying internationally. This carrier diversity ensures an abundance of seat capacity and attractive pricing.

- San Diego International Airport provides international nonstop service to ten (10) markets and growing. We are currently engaged with civic partners on securing additional international air service.
- In Summer 2018, San Diego International Airport will open a new state-of-the-art international arrivals facility that will create a seamless arrival experience that will utilize the newest arrival process automation technologies.
- And finally, the airport serves a city with global reach with efficiencies unmatched by other large airports. San Diego is continually recognized as one of the best airports in the nation for travelers. A huge convenience factor is that distances from aircraft to curbside are among the lowest of major airports in the nation.

The San Diego community is one that is extremely collaborative in order to achieve common goals. The region would be proud to serve as a headquarters for Amazon. The airport has been a key partner in economic enhancement initiatives together with the San Diego Regional Economic Development Corporation, local universities and municipalities. I think you will find our level of collaboration and teamwork unmatched anywhere in the world. We look forward to a long partnership with Amazon in providing a global access point to the second headquarters home. If there are any questions or concerns that I can answer personally, please do not hesitate to contact me at 619-400-2444, or kbecker@san.org. We look forward to a favorable action after your analysis of options.

Sincerely,



Kimberly J. Becker
President/CEO
San Diego County Regional Airport Authority



402 West Broadway, Suite 1000
San Diego, CA 92101-3585
p: 619.544.1300

www.sdchamber.org

October 9, 2017

Amazon
Office of Economic Development
c/o Site Manager Golden
2121 7th Ave
Seattle, WA 98121

Dear Jeff Bezos:

On behalf of the San Diego Regional Chamber of Commerce, we are writing to you today to express our commitment to working with your team to support Amazon's operations and growth in San Diego and the broader Cali-Baja region. As the largest local Chamber on the West Coast, representing approximately 2,500 businesses and an estimated 300,000 jobs, the San Diego Regional Chamber of Commerce is a dedicated voice for business in Southern California. We pride ourselves on a diverse, bi-national membership representing major industries including defense, tourism, life-sciences and innovation.

We are proud to write in support of San Diego's proposal to serve as the location to establish a second headquarters operation for Amazon. We represent a thriving bi-national region with world-class technical and scientific talent that continues to create products and companies with global impacts.

For the past 147 years, the Chamber has worked tirelessly to help make San Diego what it is today. From being involved in establishing institutions such as UC San Diego and the San Diego Convention Center, to fundraising and leading campaigns to develop regional resources such as Balboa Park and Mission Bay, the Chamber is committed to continuously improving San Diego.

Now the Chamber is more committed than ever to making San Diego the place where businesses can be successful, create jobs and enrich our neighborhoods. That is why we are at the forefront of crafting, revising, and reviewing regional business policies. It's why we strongly engage our elected officials to advancing proactive, positive business policies to address issues that affect our private sector. It's why we are directly involved in the political process to ensure we have business-friendly leaders in office. And it's why we can commit to you that we will be a strong advocate for Amazon.

With our intimate understanding of San Diego County, we feel strongly that our region exceeds your criteria and can provide Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality of life, world-class research institutions, and growing pools of top notch technical talent.

The business community here in San Diego is collaborative and unified. We appreciate Amazon's existing commitment to San Diego, and we look forward to working with the San Diego Economic Development Corporation and your team to officially make San Diego your second home.

If you have any questions, please do not hesitate to contact Chamber Executive Vice President and COO Jaymie Bradford at (619) 544-1365 or jbradford@sdchamber.org.

Sincerely,

A handwritten signature in blue ink, appearing to read 'JS', with a stylized horizontal line extending from the 'S'.

Jerry Sanders
President & CEO
San Diego Regional Chamber of Commerce

October 4, 2017

Mr. Jeff Bezos
Chairman, President, and CEO
Amazon.com Inc.
1200 12th Ave. South, Suite 1200
Seattle, WA 98144-2734

Dear Mr. Bezos:

CONNECT is a regional program that catalyzes the creation of innovative technology and life sciences products in San Diego County by linking inventors and entrepreneurs with the resources they need for success. Since 1985, CONNECT has assisted in the formation and development of more than 3,000 companies. CONNECT attributes its success to the unique culture of collaboration between industry, capital sources, professional service providers and research organizations in the region

On behalf of CONNECT I am writing to you today to express our commitment to this community and our willingness to work creatively with your team to support Amazon's growth in San Diego. It is with great pride and pleasure that we write to you in support of San Diego's proposal to serve as the ideal location to establish a second headquarters operation for Amazon. San Diego County is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts.

At CONNECT, we view the challenge and opportunity of new technology in terms of creating the right conditions to foster innovation and allowing it to scale. A partnership with Amazon will continue San Diego's long history of success in developing of the most competitive talent pipeline in the country. CONNECT prides itself on having a hand in many of the 477 innovation startups launched in the region last year and is confident that same pioneering spirit will power Amazon's next disruptive generation.

CONNECT joins Amazon in its acute awareness that our organizations must look and think like our country. CONNECT and the San Diego region have invested heavily in its mission is to build a more diverse pipeline of decision makers and executives. Regional leaders have raised awareness and built trust in underserved communities—reinforcing the idea that anyone with a smart idea can themselves become an innovator. This, in turn, inspires and creates more opportunities for diverse entrepreneurs which undoubtedly will be a key asset to Amazon's innovation strategy.

CONNECT believes that San Diego County not only meets and exceeds your criteria but provides Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality of life, world-class research institutions, and growing pools of top notch technical talent. We appreciate Amazon's existing commitment to San Diego, and we look forward to working with your team to ensure that our community supports your Amazon's future growth.

Sincerely,



Greg McKee
CEO, CONNECT



Jeff Bezos
Amazon Site Selection Team

Dear Jeff Bezos:

There are 14,280 reasons Amazon should select the region as your 2nd headquarters. That is our estimate on the number of technical talent our regional Universities graduates every year. This has fueled the growth of the regional tech cluster and provides the talent pipeline for San Diego to support Amazon's second headquarters.

This incredible talent production is led by UCSD one of the true global leaders in computer science and technical innovation. On behalf of Tech San Diego, we are writing to express our commitment to support Amazon's growth in San Diego. We sincerely believe that San Diego is in a unique position to serve as Amazon's second HQ. The San Diego region is truly technology's perfect climate, Tech San Diego has a robust infrastructure to support the regional tech community. We would deploy this infrastructure in support of Amazon.

Economic development for the regional tech industry is first and foremost one of talent and talent loves San Diego. Not all of us get up in the morning and surf, or go on a morning hike, but we can if we wanted to. Our geography, climate and diverse culture combine to make San Diego an envious place to work and live.

Tech San Diego would support Amazon's growth by directly integrating Amazon into the existing technology ecosystem. whether it be senior executives or individual contributors, Tech San Diego's portfolio of activities stands ready to directly support Amazon.

Tech San Diego's commitment to Amazon is to support your journey to select San Diego as the next frontier of Amazon's growth. We are a collaborative diverse tech community that not only meets your requirements but exceeds them. Our global competitiveness, world class research institutions with access to some of the best talent in the world combine to make the region uniquely qualified to grow with Amazon.

Tech San Diego looks forward to working with your team to ensure the tech community supports Amazon's future growth.

Sincerely,

Kevin Carroll,
Executive Director
Tech San Diego





2159 INDIA STREET
SUITE 200
SAN DIEGO, CA 92101
858-568-7777

cleantechsandiego.org

MISSION:

To accelerate
clean technology
innovation and
adoption of sustainable
business practices
for the benefit of
the economy and
the environment

October 6, 2017

Mr. Jeff Bezos
Founder
Amazon
410 Terry Ave. North
Seattle, WA 98109

Re: San Diego's Proposal for Amazon Headquarters

Dear Mr. Bezos,

On behalf of Cleantech San Diego, I would like to express my support for the San Diego region's proposal to be the second location for Amazon's headquarters. As you may know, San Diego is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts.

Cleantech San Diego is a member-based trade organization that positions the greater San Diego region as a global leader in the cleantech economy. Our members include more than 115 local businesses, universities, governments, and nonprofits committed to advancing sustainable solutions for the benefit of the economy and the environment. The San Diego region's cleantech sector includes solar and wind producers, energy efficiency technologies, energy storage, electric vehicles, water utilities, and smart cities solutions. The San Diego region currently ranks #4 in the nation for cleantech leadership, and we are home to the world's largest lithium-ion battery storage facility. We are also #1 in the nation for solar installations and are seen as a global smart cities leader. In addition, cities across our region are adopting progressive climate action plans that, among other things, are establishing 100% renewable energy goals for our region.

San Diego is a region with globally competitive businesses, unparalleled quality of life, world-class research institutions, and growing pools of top-notch technical talent. The members of Cleantech San Diego believe that the San Diego region not only meets and exceeds your selection criteria but provides Amazon the opportunity to grow in a region with a track-record for sparking and embracing transformational innovation. We appreciate Amazon's existing commitment to San Diego and look forward to working with your team to ensure that our community supports Amazon's future growth.

Sincerely,

A handwritten signature in black ink, appearing to read "Jason Anderson".

Jason Anderson
President and CEO
Cleantech San Diego



October 13, 2017

Mr. Jeff Bezos
Amazon
Office of Economic Development
2121 7th Ave
Seattle, WA 98121

Dear Mr. Bezos,

It is with immense pride and enthusiasm that I write to you in support of San Diego's proposal to become Amazon's new home and second headquarters. On behalf of the Downtown San Diego Partnership (the Partnership), which represents more than 11,000 property owners and 450 business in Downtown San Diego, we wish to express our commitment to working creatively with your team to support Amazon's growth in San Diego.

As a binational mega region, San Diego embodies a sense of cooperation integral to holistic innovation and progressive solutions. With five major universities in the region, San Diego offers world-class technical and scientific talent eager to create life-changing products and build sustainable companies with global impacts.

As a partner in the effort to respond to Amazon's RFP, I am confident that all four proposed sites in the San Diego region will exceed the expressed needs of Amazon's expansion, and all will offer enormous intangible benefits beyond anything your team has yet considered. That said, the Partnership's particular work, networks, and areas of expertise lend us a unique perspective on the benefits and opportunities associated with the Downtown proposal.

For the past two years, we have partnered with UC San Diego to conduct a demographic study of residents and employees of Downtown and the surrounding urban communities. As a result of this effort, we have gleaned information on the priorities, lifestyle, and preferences of those who live and work Downtown - and those who want to live or work in the city center. The results were exciting, but not surprising. Urban San Diegans are young (40% between the ages of 20 and 40), successful (average income 124% of county average), and driven to use their high levels of education (51% have obtained a

bachelor's degree or higher) to participate in work that makes an impact on the future. Of the Downtown residents who do not currently have the opportunity to work Downtown, 77% would prefer to do so, citing the vibrant urban lifestyle overwhelmingly as the reason.

This is your future workforce. A talented and ambitious population eager to make change working for the next innovation juggernaut in a region known for aeronautics, drones, cellular chips, and mapping the genome.

As a nonprofit organization committed to building a vibrant and growing Downtown community, we are strategically positioned to bring together leaders from all segments of San Diego – business leaders, policy makers, thought leaders, and urban planners. As an organization committed to connecting people and creating synergies, we have had the opportunity to cultivate relationships with key public-sector partners such as the City of San Diego, the County of San Diego, the Port of San Diego, Civic San Diego, the San Diego Association of Governments, the Metropolitan Transit District, and the San Diego County Airport Authority. As a member-based organization, we regularly act as the conduit between the business community and the public sector, and Amazon has our commitment to acting in that capacity to ensure Amazon's smooth entrance into, and ongoing operation within, our diverse community of stakeholders.

Our relationships – from city officials to CEOs – give us a clear perspective on the needs and the great potential of the Downtown community, and the path forward toward reaching that potential. We work to streamline approval processes and utilize media platforms to advocate for businesses, policies, and events that catalyze both economic growth and improve our quality of life.

We also firmly believe in empowering all Downtown community members – namely future Amazon employees – to lead economic development and social vibrancy in this community. It is for this reason that we recently hosted a workshop on placemaking in which 200 residents, business leaders, and public planners gathered to discuss and strategize how to reimagine underutilized public spaces and create places that better serve the identity and needs of the surrounding communities. We are committed to seeing the results of these discussions move out of the realm of ideas and into that of reality so current and future residents and employees can continue to boast San Diego as America's Finest City.

It is San Diegans themselves who will create the future of San Diego, because they are the ones who know what it feels like, or what it *could* feel like. To this end, we are set to launch a Downtown branding campaign aimed at putting language and imagery to the innovative and lively identity already experienced by the visitors, residents, entrepreneurs, and millennials who make up Downtown.

To continue encouraging and cultivating this innovative spirit, we worked with both the City and UC San Diego to launch the Collaboratory for Downtown Innovation (CDI).

Page 3
Mr. Jeff Bezos
October 13, 2017

With thousands of talented students graduating each year from local universities, and a thriving urban culture to which people gravitate, Downtown already possesses the ingredients to attract forward-thinking companies that are eager to employ our local talent. CDI offers programs to keep that talent honed and prepared to join the innovation economy. Through this partnership, we work to support the aspirations of the entrepreneur community by providing training and resources that bolster a creative tech ecosystem and prepare thought leaders to impact their communities. We are, in essence, preparing our ecosystem for Amazon's arrival.

As an organization, we are eager to partner with those with whom we share a common vision – creating avenues for businesses to flourish, innovation to thrive, and quality of life to soar. The talent is here. The culture is here. The vision is here.

The Downtown San Diego Partnership believes San Diego boasts all of the elements needed to allow Amazon to flourish. This is a city that is constantly transforming. In many ways, we are established and sophisticated enough to support a global, world-class company such as Amazon. In other ways, we provide a blank canvas on which Amazon may illustrate its next chapter. In either instance, as a globally-competitive, binational mega region, we have the depth of bench to satisfy each and every demand Amazon might present. At the Partnership, our promise to you, is that we will stand at the ready to ensure Amazon's every need is met and every expectation is exceeded.

We appreciate Amazon's existing commitment to San Diego, and we look forward to welcoming you to your new home with open arms.

Sincerely,



Kris Michell
President & CEO
Downtown San Diego Partnership

Board of Directors

Aquatica

Bank of America

Border Fusion Group

Cook & Schmid

Colliers International

COX Communications

DEITAC/CDT

Higgs Fletcher & Mack

HomeFed

Falcon Strategies

MAAC

McMillin, LLC

Mission Federal Credit Union

Pacific Southwest Assoc. of Realtors

Point Loma Nazarene University

Rancho Vista Properties

Republic Services

San Diego Business Journal

San Diego County Water Authority

San Diego Padres

San Diego Regional Chamber of Commerce

San Diego Regional EDC

San Ysidro Health Center

SANDAG

Schwartz, Semerdjian, Cauley & Moot, LLP

Scripps Health

SDG&E

Southwestern College

Southwest Airlines

Southwest Strategies

The B Factor

Trilogy PR Group

Turner Construction

US Bank

XEWT Channel 12/Televisa

Dignitary Council

City of Chula Vista

City of Coronado

City of Imperial Beach

City of National City

City of San Diego

County of San Diego

Port of San Diego



SCEDC

South County Economic
Development Council

October 9, 2017

Jeff Bezos

Amazon

410 Terry Avenue North

Seattle, WA 98109

Dear Mr. Bezos,

South County Economic Development Council (South County EDC) is a non-profit organization that serves the business community in the most southwesterly portion of the United States. Our service area encompasses the cities of San Diego, Chula Vista, Imperial Beach, Coronado and National City. The South County EDC Board of Directors voted unanimously in support of San Diego's proposal to serve as the ideal location to establish a second headquarters operation for Amazon. San Diego County is a thriving bi-national community with world-class technical and scientific talent that continues to create life-changing products and companies with global impacts. We would be honored to have Amazon locate its second headquarters in our region.

South County EDC is prepared to act as your Ombudsperson throughout the entire process of your relocation. This would include facilitation of developer/contractor selection, permit processing, hiring of employees, incentives and, key introductions to decision makers and "change makers". Our service does not stop when you open your doors. South County EDC has a reputation for supporting and collaborating with our business community throughout the life of the business. We would consider it a privilege to work with Amazon on a long-term basis.

South County EDC has fostered numerous partnerships throughout the San Diego region. In addition to helping companies locate or grow, South County EDC also facilitates partnerships. Most recently, South County EDC and Samsung have partnered on providing televisions for local schools, brought BAE systems and Scripps Health to educate teachers on their industry and regularly partner with companies to educate the public about their industry, as we have done with the maritime and aviation and aerospace industries. These types of partnerships between private industry, non-profit and government are successful and is the standard way we conduct business.

South County EDC believes the proposal before you today exceeds your criteria and provides Amazon the flexibility to grow in a city that is continuing to transform. We are a diverse county with globally competitive firms, unparalleled quality of life, world-class research institutions, and growing pools of top notch technical talent. We appreciate Amazon's existing commitment to San Diego, and we look forward to working with your team to ensure that our community supports Amazon's future growth.

Sincerely,

Cindy Gompper-Graves

President & Chief Executive Officer

1111 Bay Blvd. Suite E • Chula Vista, CA 91911

(619) 424.5143 • Fax (619) 424.5738

www.SouthCountyEDC.com



San Diego East County Economic Development Council

October 10, 2017

Mr. Jeff Bezos, CEO
Amazon

Dear Mr. Bezos,

On behalf of San Diego's East County Economic Development Council, we are thrilled to write this letter in support of San Diego's proposal to serve as the location for Amazon's second headquarters. San Diego is a big region with a small town atmosphere, with the caring relationships and neighborly attitude to match. Home to world-class scientific and technical talent, an unparalleled quality of life and a broad mix of industries, San Diego is uniquely well-suited to serve as the site of Amazon's new home.

San Diego is an efficient, collaborative ecosystem that offers a diverse set of effective and committed partners. The community colleges and universities are engaged in ongoing initiatives around career-relevant education and training towards industry-recognized credentials and, with more than \$260M of state-granted money, they have the resources to adapt to Amazon's technical training needs. The San Diego Workforce Partnership, San Diego's regional workforce investment board, annually allocates more than \$7M towards subsidies for hiring and training. Lastly, the U.S. government and Department of Defense frequently invest in this region and continue to seek out San Diego companies for their industry-leading expertise.

East County Economic Development Council specializes in uniting stakeholders and resource providers towards the pursuit of regional solutions. By leveraging our prior work in education, workforce, and industry, we can connect Amazon to the regional partners highlighted above and ensure an agile, responsive environment as Amazon seeks to settle in.

The East County Economic Development Council believes that the San Diego region provides a tailor-made opportunity to serve as Amazon's second home. It provides the collaboration, the agility, and the infrastructure to ensure that Amazon's transition is a smooth one. Paired with its quality of life and proximity to the Port of San Diego and the border with Mexico, we believe that San Diego provides an unparalleled opportunity for both Amazon and its employees. We appreciate Amazon's existing commitment to San Diego and we look forward to working with your team to welcome you to your new home.

Sincerely,

A handwritten signature in black ink, appearing to read "Jo Marie Diamond". The signature is stylized with loops and a long horizontal stroke at the end.

Jo Marie Diamond
President and CEO
East County Economic Development Council



950 Boardwalk, Suite 303
San Marcos, CA 92078

Re: Support for Amazon HQ2 in the San Diego Region

The San Diego North Economic Development Council (SDNEDC) fully supports the efforts of our partners at the San Diego Regional EDC and other stakeholders in the effort to provide a welcoming, viable location option for Amazon to consider for its expansion and build-out of HQ2.

The region's population of 3.3 million provides a well-qualified workforce with a concentration of computer science engineers, and science and technology workers of all skill-levels, spread across hundreds of diverse, innovation economy companies. The business climate in San Diego is also conducive for companies to grow and succeed. In all, the San Diego region offers an unmatched quality of life and diversity factor that makes this locale a premier lifestyle choice for all our employers.

The San Diego North EDC supports the proposal for quality, well-planned projects that contribute to the overall well-being of our region. Amazon would be a welcome addition here and we stand ready to work closely with all stakeholders to make our invitation as inviting and enticing as possible.

Best Regards,



Mike Cully
Chief Executive Officer
San Diego North Economic Development Council

Appendix B

SAN DIEGO » AMAZON » HQ2

S/D

Incentives

Because of the differences in each site being proposed, applicable incentives vary. Below is a list of available incentive programs that can be deployed. For sites in the City of San Diego, the City is willing to explore, to the maximum extent possible, the available and applicable incentives for each site that Amazon considers. If Amazon chooses to develop a site within the City of San Diego, a cumulative package would need to be approved by council before proceeding.

For the Chula Vista Site proposal, the city council has already taken action to approve the package proposed below.

STATE OF CALIFORNIA SITES* (Full descriptions in Appendix G: State Commitment)

- » **Transportation Solutions: up to \$250M in CalTrans Funding for congestion relief/transportation infrastructure improvements**
- » **Workforce housing: up to \$37M annually**
- » **Deployment of state Net-Zero incentives for Amazon-owned innovative transportation solutions**
- » **R&D Tax Credit off for sales tax amount of equipment used in R&D processes**
- » **Film and TV production Credit**
- » **Streamlined Permitting and Environmental Review (including pursuit of new CEQA relief)**
- » **ETP training funds: Up to \$100M over 10 years.**
- » **Cal Competes Tax Credit: Up to \$200M**

*The State of California may also be able to negotiate specific credit and programs tailored to Amazon's needs.

COUNTY OF SAN DIEGO SITES

- » **Should Amazon consider a site in San Diego, the County Board of Supervisors has voted to explore applicable incentives, such as property tax abatement, to find a solution that best meets Amazon's needs.**

CITY OF CHULA VISTA

- » **Property Tax Abatement – City of Chula Vista controlled portion – 100% - estimated \$320M**
- » **Land grant for “University Site” – 100% of value – estimated \$100M**
- » **Fee Abatement for permitting/development - \$10M**
- » **Express/streamlined permitting, on site approval office**
- » **Advisory Role on University Selection (Planned for parcel adjacent to HQ2 proposal)**

CITY OF SAN DIEGO OWNED SITE (Downtown)

- » Sales and Use Tax rebate up to 50% of new revenue generation
- » Property Tax rebate up to 50% of City's portion
- » Below market lease rate, if city retains ownership
- » Below market purchase price, if sold
- » Express/streamlined permitting, on site approval office
- » Permit fees reduced or paid by the city for site prep needs
- » Permit fees reduced or waived for new construction
- » Potential for New Market Tax Credits
- » Section 108 HUD – Up to \$25M

PRIVATELY OWNED SITE (City of San Diego other than Mission Valley)

- » Sales and Use tax rebate up to 50% of new revenue generation
- » Property Tax rebate up to 50% of city's portion
- » Express/streamlined permitting, on site approval office
- » Permit fees reduced or waived for initial phase
- » New Market Tax Credits – Partnership needed with CDE

CITY OF SAN DIEGO OWNED SITE (Mission Valley):

- » Sales and Use Tax rebate up to 50% of new revenue generation
- » Property Tax rebate up to 50% of City's portion
- » Express/streamlined permitting, on site approval office
- » Permit fees reduced or paid by the city for site prep needs
- » Permit fees reduced or waived for new construction
- » Potential for New Market Tax Credits

SDG&E

- » EcoChoice program to achieve up to 100% renewable energy
- » Partnership in development of wind and solar energy projects
- » Potential development of microgrid for increased power reliability
- » Allotted portion of up to 166MW energy storage
- » For redevelopment projects: Full no-cost energy audit
- » Installation of EV charging stations on site at Amazon HQ2
- » Dedicated account executive
- » Partner to get to LEED platinum status on any development

Appendix C: Part 1

SAN DIEGO » AMAZON » HQ2





California has always inspired big dreams, big ideas and big success for the businesses that are located here.

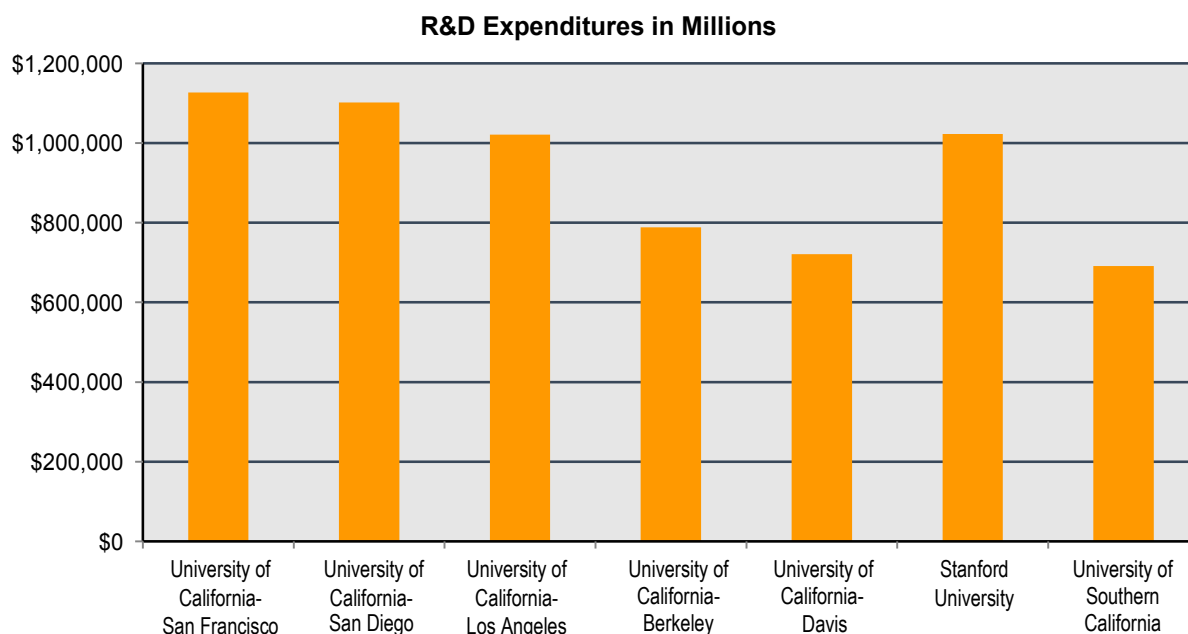
California is the best place to innovate and invest in the world – with its talented workforce, global connections, premier universities, technology ecosystem that creates transformative products and patents, and policies to invest billions of dollars into sustainable infrastructure and housing and protect the environment.

These business factors combined with the state's unmatched quality of life – surf in the morning, ski in the afternoon – make California an ideal partner for Amazon as it seeks out a home for its second headquarters.

California: Knowledge-Economy Powerhouse

Locating in California will give Amazon access to the greatest system of research and postsecondary education in the world, with 146 public colleges and universities. More than 40 percent of the workforce is college-educated. California graduates more students in science, technology, engineering, arts and math than any other state, with 91,643 degrees awarded. Sixteen percent of the 1,369 Ph.D. degrees in computer science awarded by U.S. public universities in 2014-15 were awarded in California.

Our universities, in addition to educating students for the jobs of the future, are engines of research and development. About one-third of the 41 living Turing Award winners worldwide currently hold a position at a campus or company in California. Seven of the top 30 campuses nationwide for R&D expenditures are located in California. (The next-ranked state, Pennsylvania, has three campuses on the list.) Together, these seven campuses put \$6.2 billion into R&D in 2015, representing nine percent of higher education R&D nationwide.





California's higher education system is not only top-notch: it is accessible. Average tuition at a public college or university in the state is \$2,890 per semester, and California's public 4 year college graduates have the third-lowest average student loan debt of any state – 26 percent lower than the national average. Seven of the top ten universities on the 2017 New York Times College Access Index – based on both the number of lower-and-middle-income students enrolled and the price charged – are located in California.

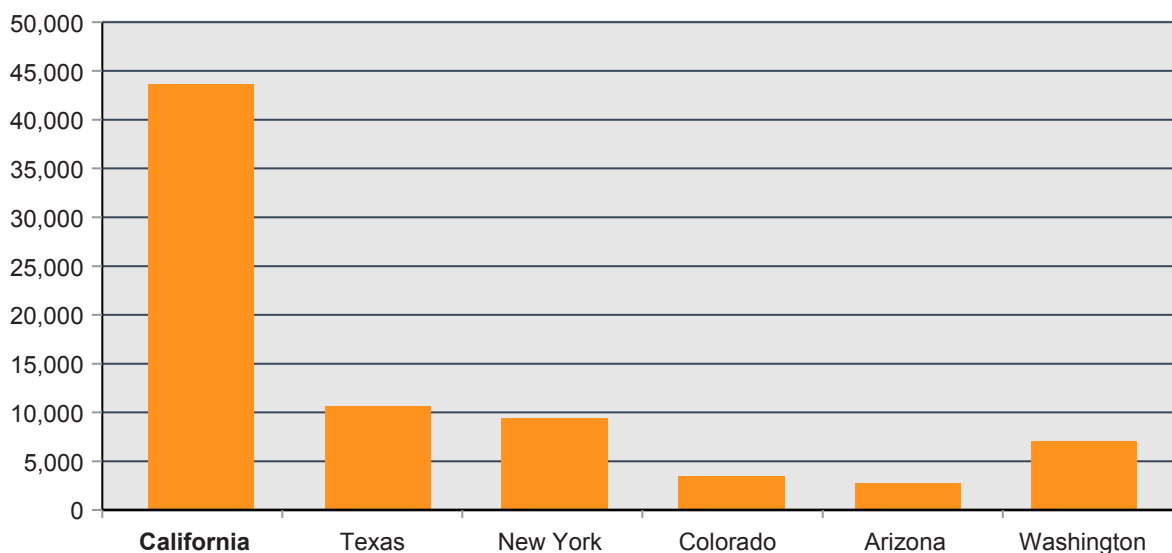
1. **University of California- Irvine**
2. **University of California- Santa Barbara**
3. **University of California- Davis**
4. **University of California- San Diego**
5. **University of California- Los Angeles**
6. University of Florida
7. Amherst College
8. **Pomona College**
9. **University of California- Berkeley**
10. Harvard University



These investments in human capital pay off. In 2015, California earned 28 percent of the 140,969 patents issued in the United States – more than twice as many patents-per-capita as the national average and over four times as many patents as the next-ranked state.

California also has the diverse workforce necessary to lead the United States into global markets. More than a quarter of California's population was born outside the country. Among English-speaking residents that are fluent in another language, there are 17 languages represented. The state is also home to many native speakers of other languages who also speak English fluently. There are seventeen languages with more than 50,000 native speakers in California.

2015 Patents by State





California: Bold Investments in Infrastructure and Housing



California is the sixth-largest economy in the world, and it is making the investments in its physical capital and housing stock to sustain and build on that advantage.

Those investments start with transportation. California will invest an additional \$5.2 billion annually over the next decade to rebuild our roads and bridges and expand mass transit. California's urban cores have incorporated bicycle infrastructure and pedestrian-friendly downtowns. We are also building what will be the only high-speed rail system in the United States, which when completed will move passengers from San Francisco to Los Angeles in under 3 hours and will eventually extend into an 800-mile system from Sacramento to San Diego.

The state is also improving access to housing, putting billions of dollars behind affordable housing measures and streamlining the building process. This year's housing package includes a \$4 billion bond measure to kick-start the construction of affordable housing, as well as a permanent revenue source for such housing through a modest fee on real estate transactions.

Finally, California will keep investing in livable communities. A \$4 billion bond measure will protect California's natural beauty, increase access to parks and upgrade water systems.

California: Epicenter of Climate Action

Like Amazon, California is committed to sourcing its energy from renewable sources, incorporating energy efficiencies into existing buildings and improving freight efficiencies by supporting zero-emission freight technologies. In 2014, California per-capita emissions were just 54 percent of the national average, and its carbon-reduction policies are emulated around the world. As a committed partner in sustainability, we will help you reduce your carbon footprint.

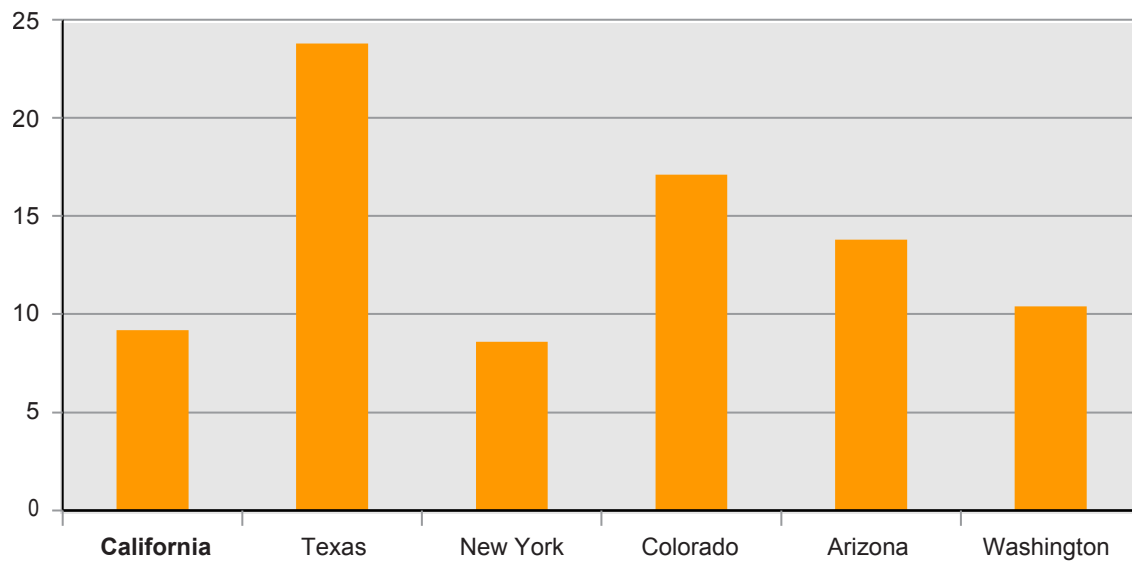


California has not only been an environmental leader but has demonstrated that sustainability and economic growth can go hand-in-hand. Our pioneering cap-and-trade program was recently extended through 2030 with bipartisan support, and we have linked our market with Quebec and Ontario – with more to come. Overall, California will reduce carbon emissions 40 percent below 1990 levels by 2030, and by that year will generate half of its electricity from renewable sources.



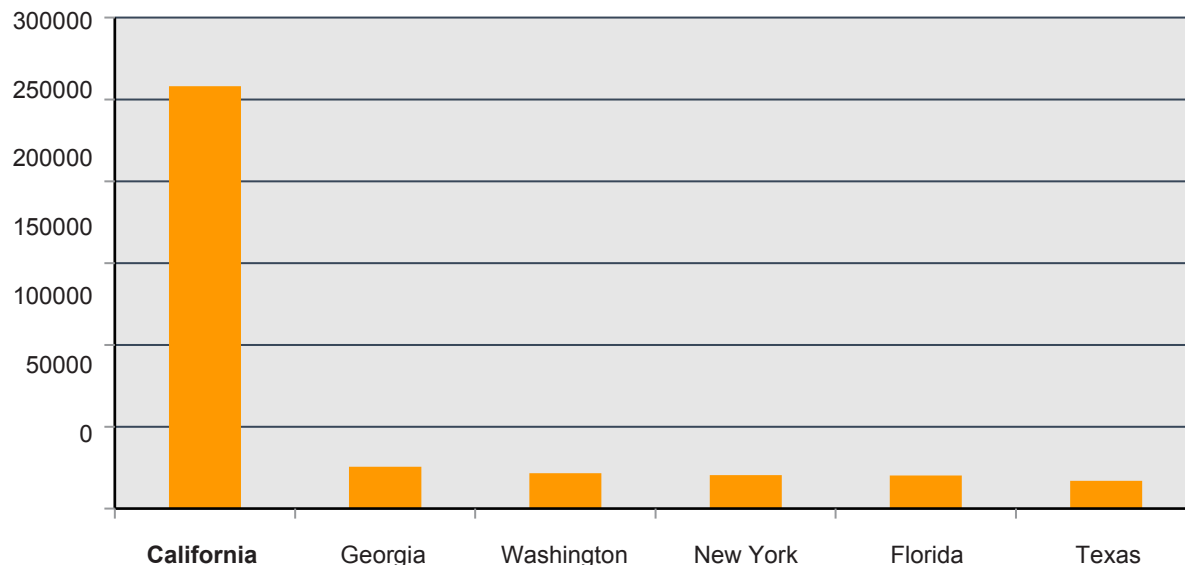


2014 Carbon Emissions Per Capita



California is also leading the way to bring zero-emission vehicle technologies from concept to market, with an action plan to bring the number of zero-emission vehicles in the state to 1.5 million by 2025. Already, California has over 325,000 such vehicles on the road, making up 47 percent of national zero-emission vehicle sales in the United States. The state is on track to help build out the infrastructure for one million zero-emission vehicles by 2020.

2011-2016 Electric Vehicle Sales



Appendix C: Part 2

SAN DIEGO » AMAZON » HQ2





California State Incentives and Permit Streamlining

This section outlines the state incentives and permit streamlining available to a project selected in California. We have a proven record of working with firms that make significant investments in our state. We have a number of flexible programs that can be tailored to meet your needs. For example, the state worked closely with industry and local government to bring the B-21 long range strike bomber contract to California. The information in this section responds to questions 2, 3 and 4 of your request for proposal.

California Competes Tax Credit

The California Competes Tax Credit program is a negotiated income tax credit awarded to competitive applicants for proposed growth in hiring and capital investment. It has spurred jobs and economic investment across the state. The Governor will propose an extension of five years in the 2018-19 State budget. The budget is released January 10, 2018, and must be approved no later than June 15, 2018.

Should California be selected as a potential Amazon HQ2 location, the Administration will work with the Legislature to pass legislation that provides certainty to Amazon in accessing these tax credits. Under current regulations, up to \$40 million annually for five years (up to \$200 million total) may be made available, and the credits can be carried forward for six years.

Workforce Development and Training Programs

California recognizes that Amazon's HQ2 will require top technical and managerial talent. California is currently making significant investments in training through programs like the Strong Workforce Program (a \$1 billion program) and the Workforce Accelerator program.

The state is committed to linking Amazon with state and local workforce partners to accelerate skill development, create new apprenticeship models and strengthen the workforce base through the aforementioned programs. The Governor will work with Amazon and local community colleges and other stakeholders to designate funds to meet Amazon's workforce needs.

The state can also promote skill-development through its Employment Training Panel (ETP), a state agency that provides funds to offset costs for job skills training. The ETP can provide up to \$10 million in funding for the Amazon HQ2 annually for the next ten years (up to \$100 million total) as Amazon hires and trains its workforce at the new location and ETP funding is contingent upon contract approval by the panel.

Streamlined Permitting and Environmental Review

California understands that speed and certainty are two key contributors to successful projects. The Governor is committed to establishing a multi-agency "strike team" for a project the size of Amazon HQ2 that will facilitate and expedite all permits and approvals. The strike team will be led by the director of the Governor's Office of Business and Economic Development (GO-Biz) and include leaders from appropriate regulatory agencies, and will coordinate with relevant utility service providers.

California has taken significant steps in recent years to streamline the California Environmental Quality Act (CEQA) process for priority projects. CEQA requires public agencies to identify the significant environmental impacts of a project





and to avoid or mitigate them, if feasible. This year, AB 246 extended the Jobs and Economic Improvement through Environmental Leadership Act of 2011 (AB 900) which expedites judicial review for any CEQA challenges to projects that meet energy conservation standards and transportation efficiencies and create good-paying jobs. Another example of actions we have taken to expedite a project is legislation (SB 743) that promoted the speedy construction of the new Sacramento Kings arena, the Golden 1 Center, by carefully limiting judicial remedies and permitting portions of that project to proceed prior to completion of CEQA review. The Governor is prepared to pursue additional legislative relief for the Amazon HQ2 project through an expedited process when the legislature reconvenes in January 2018.

Transportation Solutions

In California we have a proven track record of working with the private sector on innovative solutions to deliver transportation projects that expedite and improve our transportation systems. In the spring of 2016 the California State Transportation Agency Secretary, Brian Kelly, met with local government officials, Silicon Valley employers and community advocates to discuss transportation improvements to the 101 corridor. This focused workgroup has been successful in expediting environmental review and focusing state and local efforts on projects that will deliver accelerated improvements to the 101 corridor. As part of the transportation funding package, \$250 million annually will be provided for innovative congestion relief efforts like the 101 corridor. The Governor is committed to working with Amazon, local governments and other community advocates on innovative approaches to address transportation issues around an Amazon HQ2 project in California.

Workforce Housing

In California we understand that workforce housing is a critical factor to consider when making a siting decision. We have recently passed a permanent funding source, a housing bond and a package of reform measures that will increase housing supply in California, including workforce housing. Beginning in 2019, the state will direct approximately \$37 million annually for workforce housing that serves lower to moderate income households. The Governor is committed to working with Amazon, local governments and other advocates to create innovative partnerships that address workforce housing issues around an Amazon HQ2 project in California.

Environmental Stewardship



California is leading the way on reducing greenhouse gas emissions and making investments in technologies and projects that aid the transition of the state's economy. This year the state is allocating over \$1 billion in revenues from the cap and trade program to programs that reduce greenhouse gas emissions, including investments that increase the deployment of zero-emission vehicles (ZEVs) and necessary infrastructure. The state has also invested in Transformational Climate Communities that take an innovative and coordinated approach to reducing greenhouse gas emissions and provide local economic, environmental and health benefits to disadvantaged communities. For example, should Amazon choose to provide shuttle buses for its employees on and around its HQ2 campus, state net zero incentives could help with the acquisition of such buses. The Governor is committed to working with Amazon, the state legislature and other stakeholders to meet shared environmental stewardship goals, including the implementation of sustainability strategies for the community around an Amazon HQ2 project.



Local Government Incentives

The Governor has just approved the extension of the Capital Investment Incentive Program (AB 755) that authorizes regional and local governments to offer property tax abatement to a qualified business for up to 15 years for large projects like the Amazon HQ2 project.

Other Financial Incentives Available

The following tables list other financial incentives available to Amazon. As we learn more about the investments Amazon may make in California, we stand ready to work with the company to estimate the value of the incentives that could be available from the following targeted programs.

Other Available Tax Credits

Benefit Name (Program/Service)	Calculation/ Value	Limits	Requirements	Process Duration
Research Credit	15% of excess of qualified expenses, plus 24% of basic research payments	None	Form 3523	Filed with annual tax return
Film and TV Production Credit – Relocating TV Series	Up to \$25,000,000	Credits apply to the first \$10,000,000 of qualified expenditures	Application Required	30+ days
Film and TV Production Credit – Independent Films	Up to \$2,500,000	Credits apply to the first \$10,000,000 of qualified expenditures	Application Required	30+ days
Film and TV Production Credit – Feature Films, MOW and Mini, New TV Series and pilots	Up to \$20,000,000	Credits apply to the first \$10,000,000 of qualified expenditures	Application Required	30+ days
Film and TV Production Credit – Credit Uplift (out of zone)	N/A	The maximum credit a production can earn is 25%	Application Required	30+ days



Sales and Use Exemptions and Exclusions

Benefit Name (Program/Service)	Calculation/ Value	Limits	Requirements	Process Duration
Advanced Manufacturing, Advanced Transportation, Alternative Source, and Recycled Feedstock Cash Discounts Cogeneration Technology Common Carriers Consumer Cooperatives Containers Custom Computer Programs Delivery to Export Packers Interstate and Foreign Commerce Leases of Mobile Transportation Equipment Purchases in Foreign Countries Real property Research and Development Space Flight Property Storage and Use Exclusion Tax-paid purchases resold Transportation Charges Travel Accommodations Teleproduction and Post production equipment (Use) Tax Credit for Tax Paid to Other States Youth Organizations	Exemptions from the state's portion of the sales and use tax	Limits vary. The maximum limit for total R&D exemptions in a calendar year is \$200,000,000 in exemption	File certificate, where applicable	Immediate upon purchase

Property Tax Abatements

Benefit Name (Program/Service)	Calculation/ Value	Limits	Requirements	Process Duration
New Solar Energy System Exclusion	1% statewide, plus any local add-on	No limit	County assessor form where/when required	N/A



S/D



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